

**KAUA'I FCU  
Job Description**

<b>Job Title: Community Impact Specialist</b>		<b>Effective Date: 04.2024</b>
<b>FLSA Status: Non-Exempt</b>		
<b>PURPOSE AND SCOPE</b>		
<ul style="list-style-type: none"> <li>Serves as a resource and primary processor of Community Impact products and programs aligned with the credit union purpose and Community Impact strategy.</li> <li>Provides basic credit union transactions (new member applications) and conversations, especially with community outreach.</li> <li>Facilitates financial coaching and education programs as planned by Manager and/or Director, Community Impact.</li> </ul>		
<b>ESSENTIAL JOB FUNCTIONS</b>		
1. Respond to members and community members regarding Community Impact programs and basic credit union products and services. This may include in-person outreach/support, answering phone calls, and/or responding to voicemails, email, text, and mail. Ensure that inquiries are responded in a timely manner and with a high level of service quality.		
2. Facilitate smooth and accurate interactions/transactions by following documented policies and processes, including but not limited to New Membership account rules and maintaining average processing volumes/service levels for Community Impact programs.		
3. Serve as brand ambassadors for the credit union, by maintaining a positive attitude, patience, open and empathetic listening, professionalism, and skilled verbal and written communication.		
4. Provide Financial Coaching and Education determined by public demand and interest, utilizing Standard Operating Procedures or curricula and upholding confidentiality rules.		
5. Be willing to learn and conduct additional credit union transactions and other community impact programming as deemed necessary, including professional certificates.		
6. Must comply with applicable policies, laws, and regulations, including but not limited to the Bank Secrecy Act, the USA PATRIOT Act, Office of Foreign Assets Control, and the Equal Credit Opportunity Act.		
<b>SUPERVISION RECEIVED</b>		
<ul style="list-style-type: none"> <li>Work with minimal supervision and direction from the Manager, Community Impact.</li> <li>Empowered to solve problems in a professional and timely manner.</li> <li>Exercise discretion and independent judgment in tasks/situations detailed in departmental procedures.</li> </ul>		
<b>MANAGEMENT/SUPERVISORY RESPONSIBILITIES</b>		
Directly Supervises: NONE		

<b>IDEAL EDUCATION AND/OR EXPERIENCE</b>
<ul style="list-style-type: none"><li>• High school graduate with post-college education/certifications preferred and/or the equivalent of professional experience.</li><li>• Financial institution and/or financial coaching experience/certifications preferred.</li></ul>
<b>KNOWLEDGE/SKILLS REQUIRED</b>
Must be able to communicate (verbally and in writing) clearly in the English Language. Proficiency in MS Office (Word/Excel), Smartsheets, and Outlook preferred.
<b>CUSTOMER/MEMBER INTERFACE</b>
Daily and direct, face-to-face contact with external or internal customers or members; may include in-person outreach and follow-up correspondence via telephone, electronic messaging, etc.
<b>PHYSICAL DEMANDS</b>
<b>Work Environment:</b> <ul style="list-style-type: none"><li>• “Moderate” noise level in an enclosed air-conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.).</li><li>• Usually, indoor work with occasional work outdoors.</li><li>• Must be able to lift, push, and pull a minimum of 25 lbs.</li><li>• Must be able to operate office equipment such as: computer, telephone, scanner/printer, and calculator.</li><li>• Position may require prolonged sitting, standing, and walking.</li><li>• May be required to drive to other locations and community organizations using a personal vehicle.</li></ul>
<b>TRAVEL REQUIREMENTS</b>
<ul style="list-style-type: none"><li>• Some travel may be required to attend meeting/educational offerings by car or aircraft to various locations throughout the United States. The length of the travel varies by purpose.</li><li>• Must be able to regularly travel between the credit union’s offices in order to ensure effective operations, and to attend required meetings and training sessions.</li></ul>
<b>ATTENDANCE REQUIREMENTS</b>

**Please note that scheduled attendance requirements may change due to business needs.**

The standard workdays are: Monday, Tuesday, Wednesday, Thursday, and Friday from 8:00am – 4:30pm.

This is a full-time position and schedules may be flexed depending on community involvement needs.

Must be able to work additional hours, weekends, and Holidays as needed.

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Employee Signature

\_\_\_\_\_

Date