### Job Title: Community Impact Specialist

**Job Title:** Community Impact Specialist  
**Effective Date:** 04.2024  
**FLSA Status:** Non-Exempt

### PURPOSE AND SCOPE

- Serves as a resource and primary processor of Community Impact products and programs aligned with the credit union purpose and Community Impact strategy.  
- Provides basic credit union transactions (new member applications) and conversations, especially with community outreach.  
- Facilitates financial coaching and education programs as planned by Manager and/or Director, Community Impact.

### ESSENTIAL JOB FUNCTIONS

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.

### SUPERVISION RECEIVED

- Work with minimal supervision and direction from the Manager, Community Impact.  
- Empowered to solve problems in a professional and timely manner.  
- Exercise discretion and independent judgment in tasks/situations detailed in departmental procedures.

### MANAGEMENT/SUPERVISORY RESPONSIBILITIES

Directly Supervises: NONE
IDEAL EDUCATION AND/OR EXPERIENCE

- High school graduate with post-college education/certifications preferred and/or the equivalent of professional experience.
- Financial institution and/or financial coaching experience/certifications preferred.

KNOWLEDGE/SKILLS REQUIRED

Must be able to communicate (verbally and in writing) clearly in the English Language. Proficiency in MS Office (Word/Excel), Smartsheets, and Outlook preferred.

CUSTOMER/MEMBER INTERFACE

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.

PHYSICAL DEMANDS

Work Environment:
- “Moderate” noise level in an enclosed air-conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.).
- Usually, indoor work with occasional work outdoors.
- Must be able to lift, push, and pull a minimum of 25 lbs.
- Must be able to operate office equipment such as: computer, telephone, scanner/printer, and calculator.
- Position may require prolonged sitting, standing, and walking.
- May be required to drive to other locations and community organizations using a personal vehicle.

TRAVEL REQUIREMENTS

- 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.
- 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.

ATTENDANCE REQUIREMENTS
**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. |

_______________________________________   ______________________
Employee Signature      Date