

**KAUAI FCU**  
**Job Description**

<b>Job Title: Business Development Specialist</b>	<b>Effective Date:</b> <b>07.2025</b>
<b>FLSA Status: Hourly, Non-Exempt</b>	
<b>Reports to: TBD</b>	
<b>PURPOSE AND SCOPE</b>	
<p>The Business Development Specialist at Kauai FCU is responsible for the execution of the organizational Business Development strategy, which prioritizes key business indicator growth (membership, deposit, and loans). This will be done through increasing the number and engaging more deeply with Lokahi Partners (Select Employer Groups) through community outreach, work-site visits, and more. The Business Development strategy will be created by credit union leadership and is designed to promote, retain, and increase the Credit Union’s membership, visibility, and impact in the communities that we serve.</p> <p>The Business Development Specialist will be a “self-starter”—someone willing to listen and grow in their role. The BDS will express effective and professional communication skills and be able to follow plans independently and will work together with other credit union partners such as Marketing, Community Impact, and Operations staff. This person will also proudly represent the credit union in public settings.</p>	
<b>Essential JOB FUNCTIONS</b>	
<ul style="list-style-type: none"> <li>• Targets new business development opportunities by identifying, developing, and supporting opportunities to serve new Lokahi Partners and prospective members in the community.</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain and expand the credit union’s market penetration and visibility with existing Lokahi Partners.</li> </ul>	
<ul style="list-style-type: none"> <li>• Promotes the Credit Union through concerted outreach events (such as schools, businesses, and community events); capable of seeking out and actively participating in local networking events.</li> </ul>	
<ul style="list-style-type: none"> <li>• Facilitate full-service support to members including, but not limited to, the opening of new accounts and services, assistance with the use of credit union products and services, and referring loan applications to the loan department.</li> </ul>	
<ul style="list-style-type: none"> <li>• Responsible for tracking, reporting, and managing multiple forms of contact and data to share with Director of Community Impact, to maintain the business development plan and budget and reporting progress to management in a timely manner.</li> </ul>	
<ul style="list-style-type: none"> <li>• Maintain a professional and courteous attitude with all people, including fellow employees, members, management staff, board members, and outside vendors.</li> </ul>	
<ul style="list-style-type: none"> <li>• Perform other work as assigned.</li> </ul>	

<b>SUPERVISION RECEIVED</b>
<ul style="list-style-type: none"> <li>• Must be able to follow the execution plan for Business Development with some supervision to meet short- and long-term objectives.</li> <li>• Empowered to solve problems in a professional and timely manner within the scope of their work.</li> </ul>
<b>MANAGEMENT/SUPERVISORY RESPONSIBILITIES</b>
Directly Supervises: None

<b>EDUCATION AND/OR EXPERIENCE</b>
<ul style="list-style-type: none"> <li>• High-school education is required.</li> <li>• One (1) or more years of experience working in sales and/or business development preferred, especially at a credit union or financial institution.</li> </ul>
<b>CERTIFICATES, LICENSES, REGISTRATIONS REQUIRED</b>
Valid Driver's License and vehicle to travel.
<b>KNOWLEDGE/SKILLS REQUIRED</b>
<ul style="list-style-type: none"> <li>• Must be able to communicate (verbally and in writing) clearly in the English Language.</li> <li>• Requires ability to work within deadlines and prioritize multiple projects.</li> </ul>
<b>CUSTOMER/MEMBER INTERFACE</b>
Direct contact with external or internal members through multiple means (face-to-face, correspondence, telephone, email, etc.).

<b>REASONING/DECISION-MAKING/PLANNING ABILITY</b>
Ability to manage and make empowered decisions on assigned tasks.
<b>PHYSICAL DEMANDS</b>
<p><b>Work Environment:</b></p> <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>• Mixture of indoor and outdoor work.</li> </ul>

- Able to work a flexible schedule to accommodate events/business outside normal credit union business hours.
- Must be able to lift, push, and pull a minimum of 15 lbs.
- Must be able to operate office equipment such as: computer, fax, telephone, photocopier, and calculator.
- Position may require prolonged sitting, standing, and walking.

#### **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 to ensure effective operations, conduct work-site visits, meet with Lokahi partners (current and prospective) and other community members, community events, and to attend required meetings and training sessions.

#### **ATTENDANCE REQUIREMENTS**

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

The Business Development Specialist's schedule will be flexible based on events happening during non-credit union business hours. If no events are scheduled, a set schedule of 40 hours per pay period will be required. Remote work will be permissible after meeting and maintaining Remote Work Policy requirement(s).