P 

|  |  |  |
| --- | --- | --- |
| **Position Title** | | **Division** |
| AVP Community Development | | Retail Banking |
| **Reports To:** | **Department** | **Date** |
| VP/Community Development | Community Development | 2/2014 |
| **Supervises** | **FLSA** | **Revised** |
| Community Development Specialist | Exempt | 01/04/2022 |

# GENERAL SUMMARY

This position is responsible for identifying and executing community outreach, financial education, and business development programs for Navigant Credit Union that include the branch markets of Central Falls and Pawtucket, as well as other areas of Rhode Island as opportunities exist. This position aims to improve the credit union’s financial position by educating the underserved demographic within NCU’s footprint, including businesses, about the importance of utilizing and accessing basic financial services, as well as, educating them about NCU’s products and services. This position is responsible for developing programs, policies and objectives that support the credit union’s objectives. This position develops strong relationships with community and business leaders and other service providers as required.

**MAJOR RESPONSIBILITIES (***in descending order of importance and should be no more than 10, if possible***)**

1. Develop alliances with community groups and service providers by regularly scheduled contacts with community leaders.
2. Must be able to interact with community leaders and all levels of management and non-management and project a positive image as a representative of Navigant Credit Union.
3. Develop and conduct financial education campaigns that will provide underserved members of the community access to mainstream financial services. Conduct new member orientation on credit union products and services for small number of customers with similar circumstances. Provide detailed information and step by step instruction on the benefits and accessibility of NCU’s products and services.
4. Identify product and service opportunities and take an active role in development and implementation efforts. Identify and pursue cross-selling opportunities with existing members.
5. Monitor competitive strategies and make recommendations to senior management for possible implementation.
6. Participate in community and business organizations from a community and business development perspective.
7. Take an active role in marketing efforts, especially translation of materials from English to Spanish
8. Accompany members on loan applications and/or closings to interpret, explain and educate documents and financial terminology.
9. Network with social services providers for possible referrals.
10. Ensures the adequate due diligence, collection, and submission of completed documentation to appropriate internal departments. Produces and analyzes reports to track status and success of programs and provide status updates to senior management.
11. Maintains strong and productive internal partnerships with the Contact Center, Lending Departments, Marketing and Business Development through consistent cross referrals and ongoing communications.

# QUALIFICATIONS:

***Education***

Associates Degree or equivalent experience required. Bachelor’s degree in Finance/Accounting or other Business degree (Marketing/Communications) is highly preferred.

***Experience***/***Skills/Knowledge***:

* 1. 3-5 years previous experience in business development or sales environment, preferably in a credit union or financial institution.
  2. Demonstrated knowledge of laws and regulations impacting the financial procedures and regulations function.
  3. Bilingual in English and Spanish – written and verbal fluency required.
  4. Excellent organizational, analytical and problem-solving skills.
  5. Ability to conduct presentations and training programs.
  6. Ability to handle multiple projects/priorities simultaneously with an effective outcome.
  7. Ability to deal with highly confidential information. Must possess strong service orientation skills.
  8. Excellent verbal, written, telephone and interpersonal communication skills.
  9. PC proficient, including Microsoft Office (Word, Excel, PowerPoint, Outlook) and the Internet.
  10. Ability to function in a commercial office environment and utilize standard office equipment including but not limited to: fax, copier, telephone, etc. Some travel required. Ability to lift a minimum of 25lbs.

e.g. file boxes

# GENERAL DESCRIPTION:

***In terms of physical requirements, this position requires work best described as:***

* Sedentary  Light  Medium  Heavy  Very Heavy –

# PHYSICAL TASKS:

* Standing/Walking/Bending/Stooping –Occasional.
* Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous.
* Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous.
* Reading – Ability to receive information through fax, e-mail and text messages – Continuous.

# AUDIO / VISUAL:

* Requires vision to perform work dealing with data and figures and computer screens. - Frequent.
* Requires ability to prepare and execute presentations, training programs and seminars. - Occasional.

# PSYCHOLOGICAL/MENTAL DEMANDS:

* Responds positively and productively to stressful (internal and external) member situations - Continuous
* Assists others to work harmoniously and effectively as part of a work team. – Continuous

|  |  |
| --- | --- |
| **Employee’s Signature** | **Date** |
| **Manager’s Signature** | **Date** |
| **Human Resources’ Signature** | **Date** |