



POSITION TITLE: Community Impact Coordinator
REPORTS TO: Director of Community Impact
SUPERVISES: None
STATUS: Exempt
EFFECTIVE: October 2023

NOTE: Point West Credit Union believes each employee makes significant contributions to our success. Contributions should not be limited to assigned responsibilities. Job descriptions are not intended, and should not be construed to be, exhaustive lists of all responsibilities, skills, efforts or working conditions associated with a job. They are intended to be an accurate reflections of principal job elements essential for making a fair pay decision about jobs. It is our expectation that each employee will offer his/her services wherever and whenever necessary to ensure the success of our endeavors. Nothing in this position description is an implied contract for employment. The functions are not all encompassing and are subject to change at any time by management.

Exempt Profile:

Strategically-oriented, community-minded exempt-level employee respectfully and enthusiastically challenges self to be their best; and to work cooperatively and collaboratively with a shared sense of urgency. The team member acts ethically, humbly, and with the best of intentions to achieve Strategic Ends.

ESSENTIAL STRATEGIC FUNCTIONS:

1. Engages with organizations to connect Point West with its community, which includes non-profits, members, small businesses and Credit Union resources.
2. Executes functional duties to support Strategic Business Plan initiatives. Contributes creative ideas/resources and data to increase impact and to achieve identified goals.
3. Utilizes data and resources to research and report on current impact and outreach; and future business/community strategies and objectives.
4. Actively and accurately promotes the Credit Union's strategic and business plans as appropriate to the board, staff, members, vendors and the public.
5. Demonstrates ability to collaborate and provide suggestions across all levels of management, including executive leadership.
6. Ensures compliance of legal obligation.
7. Champions a strong service and education culture.
8. Is a Point West Credit Union and Industry Advocate.

FUNCTIONAL JOB SKILLS:

1. Shares responsibility in coordination of all credit union community development activities.
2. Coordinates lending partnerships to drive credit union loan growth, including auto programs, real estate, microenterprise lending relations, other strategic lending partners, etc.
3. Self-monitors and reports performance and compares to goals.
4. Supports external and internal communications including bilingual (English/Spanish) copywriting, editing and publishing of materials and delivery across all member channels.
5. Generates and posts bilingual (English/Spanish) social media content on behalf of the Credit Union as needed (Facebook, Instagram, etc.).

6. Prepares for and delivers at Credit Union approved events and financial education workshops, and as needed, follow up sessions on relevant topics.
7. Coordinates and administers community events and workshop schedules, with oversight responsibilities for coordinating volunteers and logistics.
8. Proactively participates in networking opportunities within the community as a representative of the Credit Union.
9. Contributes and adheres to Marketing & Community Outreach Plan objectives and long-term Strategic Business Plan targets.
10. Presents and/or facilitates meetings, events, and training for Credit Union staff.
11. Champions the credit union brand, including articulating the brand vision, proliferating brand awareness and building visibility among members, the community and credit union movement.
12. Supports reporting on engagement, including measuring campaign and promotional ROI, as well as analyzing community partnerships, identifying roadblocks, etc.
13. Develops needed strategic partnerships to achieve identified community impact and Credit Union goals.
14. Supports programs, promotions and events to enhance the member experience, reach credit union and community outreach goals, and increase reach and relationships within the local community.

SUPERVISORY JOB SKILLS: Not applicable

STANDARD JOB SKILLS:

1. **Initiator.** Acts independently with minimal direction. Works to meet and exceed the Strategic Plan. Strong ability to work independently with little supervision.
2. **Judgment:** Continually uses sound judgment, as outlined in:
 - a. Employee Handbook
 - b. Code of Ethics
 - c. Promises
 - d. Executive Limitations
3. **Change Management:** A strong leader in change management principles. Fosters curiosity and a sense of urgency. Is flexible, easily adapts to change; and promotes/assists with change in the work environment.
4. **Analytic Ability:** Requires strong ability to **apply** principles of logic to define problems and desired outcomes, collect data, establish facts, and draw valid conclusions from multiple sources of an objective and subjective nature.
5. **Sense of Urgency/Strategic Thinking:** An energetic, forward thinking and creative individual who proactively seeks efficient processes and effective methodologies to effectively and safely leverage strategic ends.
6. **Interpersonal Skills:** Strong emotional intelligence necessary to build and sustain effective partnerships through active listening, deft verbal and written communication, effective negotiation and effusing an accessible demeanor.
7. **Project Management:** Strong ability to:
 - a. Organize and implement projects **on time** by prioritizing, multi-tasking and leveraging resources.
8. **Public Speaking:** Ability to confidently and effectively present and facilitate bilingually (English/Spanish) before an array of audiences.

9. **Technical Skills:** Savvy with a vast array of computer programs and office equipment. Advanced proficiency with programs and resources used to distill and leverage data.
10. **Confidentiality:** Demonstrates a high level of confidentiality, sensitivity and tact.
- Credit union operations and philosophy.
 - Current and emerging laws and regulations pertaining to areas of responsibility required, including Local, State and Federal Laws.
 - Credit unions products and services to effectively set attainable goals to achieve strategic ends.

EDUCATION AND/OR EXPERIENCE:

- Undergraduate degree required in Marketing, Business Administration, or appropriate/related degree.
- A minimum of five years progressive experience in this Job Description's Functional Area(s) of Expertise.
- Bilingual in English and Spanish required.
- Completion of the Credit Union's financial counseling certification program (FiCEP) within 12 months of employment. Must maintain certification as required by certification program.

PHYSICAL / MENTAL DEMANDS:

(Physical demands)

- Continuous sitting for extended period when performing duties.
- Occasional-to-frequent standing and walking.
- Occasional-to-frequent lifting up to 35 lbs. (promotional materials and supplies).
- Occasional-to-frequent bending, squatting, or reaching at ground level.
- Frequent use of hands in repetitive tasks such as simple grasping, twisting/turning of wrists; finger dexterity.
- Continuous speaking and hearing for interaction with staff, members, and outside contacts.
- Continuous ability to see close and at a distance.

(Mental demands)

- Continuous interaction with others, repetitive work, attention to detail, ability to solve complex problems, alertness, precision, concentration, accuracy, thoroughness, and memory demands.
- Frequent fast-paced work.
- Frequent deadlines, flexibility, performing basic and complex numeric calculations, writing, reading, comparing, analyzing, judgment, reasoning, patience, negotiating, and supervision and instruction of others.

WORKING CONDITIONS:

- Continuous operation of office equipment.
- Length of workday is unpredictable and occasionally must work irregular and/or extended hours to include evenings and weekends for events including but not limited to: Meetings with credit union partners, Industry Events, Training and Community Engagement.
- Exposed to potentially hazardous condition, i.e., robbery. Follows detailed instructions and procedures to minimize the risk.
- A valid driver's license and frequent travel is required.



The physical demands and work environment characteristics described are representative of those met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee Signature

Date

Manager Signature

Date

HR Signature

Date
