

**CAL STATE L.A. FEDERAL CREDIT UNION  
POSITION DESCRIPTION AND SPECIFICATIONS**

<b>POSITION:</b>	BUSINESS DEVELOPMENT REPRESENTATIVE (PART-TIME)	<b>EFFECTIVE DATE:</b>	01-2023
<b>REPORTS TO:</b>	VICE PRESIDENT MEMBER EXPERIENCE & LENDING	<b>FLSA STATUS:</b>	Non-Exempt

**SUMMARY**

Under general direction of the VP Member Experience & Lending, responsible for implementing business development and relationship building programs and activities designed to communicate value and attract new members from California State University, Los Angeles (CSULA), community business partners and select employee groups. Responsibilities include working closely with third party marketing vendor to achieve growth goals.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Spends up to 50% of time networking and developing relationships within the community and the field of membership.
- Develops relationships throughout CSULA to include students, organizations, faculty, staff and alumni; Creates opportunities for informational and educational presentations; Educates and motivates community representatives and potential members.
- Attends CSULA orientations and events, community meetings and events, and other meetings, activities, and events to support field of membership segments; Distributes product/service brochures and promotional items.
- May be asked to assist with direct mailing pieces, operational forms, advertising specialty items and other media as required.
- Monitors placement and quantity of lobby materials; Ensures all media and displays are current.
- Responsible for planning, preparation and follow-up of all member-related events, meetings, seminars, celebrations, etc.
- Regularly educates staff on community events and partnerships.
- Supports staff with production and delivery of operational and promotional forms, signage and brochures. Assists staff with writing letters and other items as required promoting the credit union in a positive and professional manner.
- Provides training for staff in regard to ongoing promotions; Maintains shared network resource to provide staff with promotion details.
- Works with website vendor to ensure website information is accurate and current.
- Prepares monthly report for Board of Directors.
- Remains current on credit union laws and regulations. Recommends changes to maintain compliance.
- Actively adheres to the Expectations for Managers document.
- Other duties as assigned.

**PROFESSIONAL POSITION REQUIREMENTS**

This position requires the incumbent to:

- Maintain a positive and professional behavior and image with credit union members, staff, management, board, and community at large.
- Establish and maintain effective business relationships with all field of membership segments, credit union vendors and counterparts in the credit union industry.

- Keep all credit union and member information confidential.
- Maintain a professional appearance.
- Work efficiently without constant supervision.

### **ENVIRONMENT/PHYSICAL ACTIVITY**

The primary environment for this position is outside the credit union office calling on business leaders, members and potential members at their worksites, attending meetings or participating in special events. It is assumed the off-site environment is mostly clean and comfortable. It may include minor annoyances such as noise, odors, drafts, etc. Events are sometimes held outdoors. Event participation often requires transportation of brochures/flyers and promotional give-away items in a wheeled crate. The secondary environment is a non-confined, office-type setting in which he/she is free to move about at will. Physical activity may include sitting, standing, walking, driving, carrying/lifting (up to 20 lbs.), listening, speaking and writing. Frequent driving and use of a car is required.

### **MENTAL DEMANDS**

The incumbent in this position must be able to accommodate the following demands:

Constant distractions/interruptions.  
 Uncontrollable changes in priorities/work schedules.  
 Long periods of constant contact with others where no privacy is possible.  
 Time pressures and tight deadlines.  
 Frequent use of car to drive to other locations.

### **EQUIPMENT OPERATION**

The incumbent of this job typically spends time operating equipment as follows:

Telephone and ancillary equipment.  
 Standard computer with video display screen, keyboard and mouse.  
 Audio visual equipment, projectors, cameras.  
 Multi-function or single function printers, copiers, fax machines.  
 Adding machine and/or calculator.  
 Vehicles such as automobiles, vans, pickup trucks.

### **POSITION REQUIREMENTS**

**These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this job. Individual abilities may result in some deviation from these guidelines.**

To perform effectively in this position, the incumbent must have:

- 2-3 years of related experience; Knowledge of credit union/financial institution products/services.
- Good people skills; outgoing personality.
- Excellent verbal and written communication skills.
- Excellent presentation skills.
- Personal computer skills including Word processing and desktop publishing.
- Professional appearance.
- Working knowledge of business development methods.
- Valid California driver's license and satisfactory driving record with DMV.
- Automobile insurance that includes minimum liability coverage as required by state law.

**BENEFITS**

Medica, dental and vision. Retirement, life insurance, 11 paid holidays and accrued PTO.

Typically, these skills and knowledge are the result of working experience in sales or a similar position.

The incumbent must be able to perform this job safely, without endangering the health or safety of him/herself or others.

The management of the Credit Union may change this position description at any time, according to business needs.