

## POSITION DESCRIPTION

<b>POSITION TITLE:</b>	Connections Manager	<b>DEPARTMENT:</b>	Connections
<b>CLASSIFICATION:</b>	Exempt	<b>APPROVED BY:</b>	Human Resources
<b>GRADE:</b>	13	<b>LAST REVIEW:</b>	01/03/2025

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### REPORTING RELATIONSHIPS

**POSITION REPORTS TO:** VP of Member Experience  
**POSITIONS SUPERVISED:** Member Solutions Specialists

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### POSITION PURPOSE

Responsible for short- and long-term planning, organizing, and directing the activities of the Member Solutions Specialists, including retail lending, deposit, account services, and sales activities. Assists in, oversees and monitors the retail loan, retail deposit and deposit services results. Reviews and provides input on departmental policies and procedures and helps to implement modifications as needed. Directs, trains, coaches, supervises and appraises department personnel. Ensures retail lending, deposit, and account activities are conducted in accordance with established standards. Ensures services are delivered professionally, accurately and efficiently. Proactively supports and advances HCU's brand and culture platform.

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### ESSENTIAL FUNCTIONS AND BASIC DUTIES

**Assumes responsibility for the effective planning, development, and administration of retail lending, deposit, and related account functions.**

- Assists the VP of Member Experience in developing short and long-term goals for the department.
  - Assists in developing and implementing policies, procedures, and standards for retail lending, deposit, account opening, and related services. Conducts periodic reviews of existing policies and procedures to ensure they are effective and current.
  - Executes established department goals and ensures that corporate-wide plans and programs are complemented and supported.
  - Monitors and evaluates work quality, efficiency, and productivity. Ensures completed work is of the highest quality. Provides suggestions for improved service delivery and product/software enhancements. Seeks new methods to accomplish departmental tasks.
  - Ensures deadlines are kept and records and loan documentation are complete and accurate. Oversees the compilation of monthly department reports.
  - Ensures department functions are completed in accordance with established policies, procedures, program requirements, and related legal standards.
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- Ensures the integrity and accuracy of all loan and account documents.
- Promptly addresses and resolves incomplete/inaccurate account and loan documents.

**Provides leadership to staff through hiring, training, coaching and development.**

- Ensures high quality work and efficiency in service, lending and operations are maintained. Determines work methods and flow through assigning, directing, coordinating, and reviewing tasks.
- Assesses each assigned employee's performance and holds regular coaching sessions to further bolster employee performance. Coaches and mentor's employees.
- Sets goals, tracks individual progress and conducts performance appraisals on each employee based on performance management program guidelines.
- Effectively communicates policy/procedure changes, security measures, and other relevant credit union information to staff. Ensures staff members have the opportunity to ask questions and gain adequate understanding of information.
- Conducts regular meetings with employees to inform and train. Discusses areas needing improvement and changes in procedure.
- Ensures personnel are well trained in all phases of their respective jobs including lending, sales, service and operations.
- Works with human resources and management to determine appropriate staffing levels for proper utilization of human resources.
- Performs all required administrative duties related to supervising staff including, approving time sheets, time off requests, scheduling etc.

**Assumes responsibility for establishing and maintaining effective, professional business relations with members and employees.**

- Builds relationships with consumer and business members.
- Ensures members' requests and questions are promptly resolved.
- Ensures a positive experience is delivered to our members through the service provided by the Connections Department.
- Ensures members are informed of HCU services and policies. Counsels' members regarding their financial needs and services requested.
- Ensures exceptional member experience across all communication channels – including, not limited to Member Suites, phone and email.
- Maintains advanced working knowledge of HCU's products and services.
- Ensures HCU's quality reputation is maintained and projected.
- Keeps management informed of area activities and of any significant problems. Provides suggestions and input for policy/procedure changes, improved member service, and/or greater account retention.
- Actively contributes to positive, professional working environment.

**Assumes responsibility for related functions as required or assigned.**

- Performs all other duties and special projects as assigned.
- Completes required reports and related documents promptly and accurately. Ensures reports are made and submitted according to established regulations and deadlines.
- Attends and participates in meetings and training as required.
- To abide by all federal, state, and local laws including but not limited to: The Bank Secrecy Act, including the Office of Foreign Assets Control (OFAC) and Financial Crimes Enforcement Network (FinCEN); Uniform Commercial Code (UCC); Federal Reserve Bank; and National Credit Union Administration.

## PERFORMANCE MEASUREMENTS

1. Department functions are effectively and efficiently completed in accordance with established HCU policies, procedures, standards, and related program and legal requirements. Safe and sound lending practices are maintained.
  2. Service and quality goals are met. Suggestions for improved service are developed and implemented.
  3. Loan and deposit volumes, memberships, account products, ancillary product/service sales, and referrals meet (or exceed when appropriate) HCU standards and goals.
  4. Department standards, policies and procedures are regularly reviewed and modified as needed. Appropriate Departmental and employee goals are formulated.
  5. Loan documents, account documents, account records, and related files are complete, accurate, and timely.
  6. Professional business relations exist with members and external business contacts. Questions and problems are promptly and courteously resolved. Assistance is provided as needed.
  7. Effective working relations exist with HCU personnel and with management. Assistance is provided as needed. Management is appropriately informed.
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## QUALIFICATIONS

**EDUCATION/CERTIFICATION:** Two-year college or higher in related field preferred; or equivalent experience.

**REQUIRED KNOWLEDGE:** Familiarity with HCU sales standards, policies and procedure.  
Thorough knowledge of HCU services and products.  
Understanding of related legal and regulatory requirements.  
Familiarity with department functions, policies, and procedures.

**EXPERIENCE REQUIRED:** Minimum of five years of related lending experience.  
Administrative and supervisory experience.

**SKILLS/ABILITIES:** Strong leadership and supervisory skills.  
Excellent financial analysis abilities.  
Solid communication and negotiation abilities.  
Excellent public relations skills.  
Ability to understand, interpret, and enforce policies and procedures..  
Willingness to assist others.  
Strong sales/referral skills.  
Able to operate related computer applications and PC.  
Proficient in MS Office including Word, Excel and Outlook.  
Flexible and open to change.

## PHYSICAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

**TALKING:** Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.

**AVERAGE HEARING:** Able to hear average or normal conversations and receive ordinary information.

**REPETITIVE MOTION:** Movements frequently and regularly required using the wrists, hands, and/or fingers.

**AVERAGE VISUAL ABILITIES:** Average, ordinary, visual acuity necessary to prepare or inspect documents or products, or operate machinery.

**PHYSICAL STRENGTH:** Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally.

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## **WORKING CONDITIONS**

**NONE:** No hazardous or significantly unpleasant conditions (such as in a typical office).

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## **MENTAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION**

**REASONING ABILITY:** Ability to apply logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions.  
Able to interpret a variety of technical instructions and can deal with multiple variables.

**MATHEMATICS ABILITY:** Ability to calculate discounts, interest, profit and loss, commission, markups, and selling prices. Capable of performing basic algebraic equations and applying basic geometric concepts in problem-solving.

**LANGUAGE ABILITY:** Ability to read and interpret industry publications, business reports, operational manuals, digital content, and professional communications.  
Ability to prepare structured business documents such as formal emails, proposals, reports, and training materials following standard formatting and grammar conventions.  
Ability to conduct training sessions, participate in panel discussions, and deliver professional presentations using appropriate language and delivery techniques.

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## **INTENT AND FUNCTION OF JOB DESCRIPTIONS**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*