

**HAWAII MEDICAL SERVICE ASSOCIATION
JOB DESCRIPTION**

Date: July 31, 2018

Job Title: Credit Union Manager

Department: Credit Union

Reports to: Director, HMSA Employees Credit Union

Cost Center: 4240

Job Description Completed by: Gloria Omandam, Credit Union

PRIMARY PURPOSE:

Manage the operation of the HMSA Employees Federal Credit Union. Collaborate with the Director to set the Credit Union’s financial goals, objectives, and budgets. Works with the Director to recommend and implement approved changes in business strategies and member programs to prepare operational and financial reports to the Board of Directors. Manages associated risks, adhere to federal and state laws and regulations; and be aware of tax laws and regulations that affect the Credit Union. At all times be in compliance with NCUA regulations and where applicable with HMSA policies and procedures. Oversee the preparation of financial reports investment activities and be responsible for cash management strategies in concert with the Board of Director’s ALM Committee (Asset, Liability Management). Other than the Director, manage all aspects of the Credit Union Employees.

ESSENTIAL DUTIES/FUNCTIONS:

a. Assist the Director to implement Credit Union policies, procedures and practices which include the organization’s financial goals, objectives and budgets. Make business improvement recommendations and coordinate with the Director to seek approval from the Board of Directors..	30%
b. Mentor, train and develop 5 employees to promote career enhancement and to elevate the level of competence. This would include training all employees to be adept in all non-management phases of all Credit Union operations.	30%
c. Manage with assistance of ALM to meet or exceed established periodic quotas. This would include the management of associated risks, adhering to federal and state laws and NCUA regulations. Develop a loan strategy to meet or achieve goals set by the Credit Union Board. Oversee the preparation and timely submission of financial and regulatory reports as required by NCUA compliance regulations.	25%
d. Develop, improve, and work with the Credit Union Educational Committee for all in house Promotions and all other needed Credit Union activities.	10%

Subtotal 95%

OTHER DUTIES/FUNCTIONS:

a. Perform other duties as required	5%
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Grand Total 100%

QUALIFICATION REQUIREMENTS:

Education/Experience:

Minimum – Bachelor's degree in Finance, Accounting, Economics or Business Administration and four years related experience in staff management at a financial or loan institution or equivalent combination of education and experience.

Preferred - Seven or more years of staff management at a financial or loan institution. Master's degree in Finance, Business Administration or related field.

Skills/Knowledge:

Minimum – Skills

- Understand and resolve customer issues in a timely and professional manner.
- Communicate effectively with all levels of personnel within the organization.
- Communicate and solve simple to complex issues and present recommendations to Director or Board.
- Strong analytical, verbal and written communication skills.
- Previous supervisory experience or proven leadership ability.
- Strong working knowledge of Microsoft Office and EPL.
- Plan and set goals for others and monitor, measure, and report progress.
- Provide training, guidance, and challenge to staff to allow them to achieve department goals.
- Improve processes through proactive thinking and appropriate planning and execution.
- Implement change and lead others in change to align with CU goals.
- Work in a team environment either as a leader or participant.
- Develop, interpret and use information to deliver results.
- Recruit new staff members as deemed appropriate.
- Project Management skills

Minimum – Knowledge

- Advanced knowledge of standard financial reports (profit/loss statement, balance sheet)
- Working knowledge of standard accounting processes and principles
- General knowledge of data and data manipulation methods (assembly, tabulation, interpretation, presentation)
- General knowledge of project management protocols and processes for managing small to large projects involving outside vendors.
- Knowledge of EPL processing system.
- Cope with changes and have working knowledge of economic, budget, banking and information systems.

Preferred – Skills

- 2 year or more in a managerial position involving planning, budgeting, and the gathering of financial information for customers.
- Evidence of continuous self-development activities such as computer courses, project management courses, etc.

Preferred – Knowledge

- 3 year or more in managing medium to large projects.
- 2 year or more in facilitating or participating in continuous improvement planning and implementation.

Special Training, Certification, Licenses:

None required. CPA preferred.

Language Skills:

Minimum:

- Fluent command of the English language
- Ability to write professional quality structured analytical manuscripts for publication and/or use by executive staff
- Ability to write structured reports and summaries which present purpose, background, issues, approach, procedures, findings, and interpretation
- Ability to summarize at a general level separate from a summary of detail
- Ability to effectively present summaries as well as details of projects and studies in a structured and professional manner to senior management and technical audiences
- Ability to read, analyze, and interpret business periodicals, professional journals, government laws and regulations
- Ability to interpret customer requirements and specifications
- Ability to effectively present information and respond to questions from executives, Board, Auditors, staff, or members of the credit union. .

Mathematical Skills:

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, and percentages. Ability to apply concepts of basic algebra, fractions, percentages, ratios, and proportions to practical situations.

Reasoning Ability:

Ability to define problems or issues, collect data, establish facts and draw valid conclusions. .

WORKING CONDITIONS:

Equipment Used – Personal computer, general office equipment, photocopier, telephone, Cash dispenser, internet and email.

Work Hours - Regular hours; 7:00 a.m. to 4:00 p.m., Monday through Friday. Regular attendance required.

MENTAL DEMANDS: The Manager of Credit Union performs assignments of high to complex difficulty independently. The Manager of Credit Union must abide to Federal, State, and NCUA bylaws in a timely manner. The position requires problem solving and basic decision-making skills.

PHYSICAL DEMANDS: Position involves lifting/moving boxes of reports and/or files.

CONTACTS: The Manager of Credit Union deals with external customers, Director of CU, Board of HMSA CU, and HMSA Employees FCU members.

Internal – Finance and Accounting, Executive Staff, Information Systems, and Legal/

External – Auditors, NCUA, Vendors, and Members.

Competencies – Core Values (as applicable)

**ENGAGEMENT
(Mutual Commitment)**

- 1. Approachability
- 2. Composure
- 3. Building Relationships
- 4. Negotiating
- 5. Adaptability
- 6. Collaboration & Cooperation
- 7. Team Leadership

- 8. Customer Focus & Impact

Lead/Leadership Competencies

- 1. Motivating Others (L)
- 2. Managing Vision & Purpose (L)
- 3. Developing Direct Reports & Others (L)

**INNOVATION
(Creative Solutions)**

- 1. Creativity & Perspective
- 2. Strategic Agility
- 3. Focus
- 4. Adding Skills & Capabilities
- 5. Agile Learner
- 6. Action Oriented
- 7. Problem Solving

- 8. Decision Making

Lead/Leadership Competencies

- 1. Innovation Management (L)
- 2. Effective Use of Resources (L)
- 3. Staffing Effectively (L)

**ACCOUNTABILITY
(Transparency & Responsibility)**

- 1. Organizational Alignment
- 2. Integrity & Trust
- 3. Self Knowledge
- 4. Effective Communication
- 5. Drive for Results & Perseverance
- 6. Courage & Command Skills

Lead/Leadership Competencies

- 1. Leads Others Effectively (L)
- 2. Drives Accountability of Staff (L)
- 3. Managerial Courage (L)

Must abide by HMSA's Employee Handbook and comply with the HMSA's Code of Business Conduct and Compliance and Ethics Program, and adhere to the Standards of Conduct and provisions of the Code as a condition of employment.

Hawaii Medical Service Association reserves the right to assign additional duties and to add, delete or modify any essential or marginal job functions.