

## Western Cooperative Credit Union Job Description

**JOB TITLE:** President/Chief Executive Officer

**DEPARTMENT:** Executive Management

**REPORTS TO:** Board of Directors

**FLSA STATUS:** Exempt

**Purpose:** Supervises and coordinates activities of Senior Managers of departments and branches. Responsible for leading and directing organizational activities and anticipating the needs for WCCU and its members.

**Essential Duties and Responsibilities** include the following. Other duties may be assigned.

Responsible for overseeing Senior Management and overall operations of the credit union including outlying branches.

Oversee the staffing of the credit union to ensure all areas are meeting credit union objectives.

Ensure that staff is trained and cross-trained in all phases of their particular jobs and in all credit union procedures, products and services to ensure the highest quality of service to members.

Establish strong community presence in the areas served by the credit union.

Responsible for overseeing Insurance CUSOs.

Monitors and reviews financial condition of the credit union.

Monitor economic environment and industry trends.

Establish and maintain effective employee relations. Resolve employee relation issues.

Evaluate job performance of subordinates to ensure quality of work and service to members.

Develop, apply, and evaluate policies and procedures for the credit union. Ensure that staff complies with policies and procedures and understand changes in requirements. Maintain a thorough knowledge of policies and procedures in the credit union industry.

Hold periodic staff meetings to discuss areas needing improvement, changes in procedures, new developments or services, and to present general information. Encourage the exchange of ideas.

Maintain knowledge of all State and Federal regulations that are applicable to the credit union.

Review financial and operating statements and identify areas of concern.

Approve member exceptions when necessary.

Involved in development of the Board of Director monthly meeting packets and agenda.

Coordinate with the Board of Directors in the mission and vision for the organization. Communicate the vision with staff and members.

Keep Board of Directors informed of credit union activities and provide recommendations to improve performance.

Work with regulators for good public relations and credit union business accuracy. Completes required reports and documents.

Primary representative of the credit union and its' LLCs in all aspects and ensure a positive reputation is maintained.

Oversee the planning and coordinating of the membership Annual Meeting.

### **Supervisory Responsibilities**

Directly supervises 8 to 10 employees at the Senior Management Level. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include planning, budgeting, strategic direction, community relations, directing work; appraising performance; and resolving problems. Works closely with CUSO Insurance agencies.

### **Competencies**

To perform the job successfully, an individual should demonstrate the following competencies:

Analytical - Collects and researches data; Uses intuition and experience to analyze data.

Design - Demonstrates attention to detail.

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

Technical Skills - Strives to continuously build knowledge and skills; Shares expertise with others.

Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Responds to requests for service and assistance.

Interpersonal Skills - Focuses on solving conflict; Maintains confidentiality; Keeps emotions under control; Remains open to others' ideas and tries new things.

Oral Communication - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions.

Written Communication - Writes clearly and informatively.

Teamwork - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.

Visionary Leadership - Inspires respect, dedication, and trust.

Change Management - Communicates changes effectively; Builds commitment and overcomes resistance.

Delegation - Delegates work assignments; Matches the responsibility to the person; Gives authority to work independently.

Leadership - Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others.

Managing People - Makes self-available to staff; Provides regular performance feedback; Develops subordinates' skills and encourages growth.

Quality Management - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness.

Business Acumen - Understands business implications of decisions.

Diversity - Promotes a harassment-free environment.

Ethics - Treats people with respect; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values.

Judgement - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

Planning/Organizing - Uses time efficiently; Organizes or schedules other people and their tasks.

Quality - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

Quantity - Completes work in timely manner.

Safety and Security - Uses equipment and materials properly.

Adaptability - Adapts to changes in the work environment; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent.

Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions.

Innovation - Meets challenges with resourcefulness; Generates suggestions for improving work.

**Qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and/or Experience**

Bachelor's degree preferably in finance or related field and five years of experience at the senior management level in a financial institution – preferably a credit union.

### **Language Skills**

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization.

### **Mathematical Skills**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

### **Reasoning Ability**

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

**Physical Demands:** The physical demands described here are representative of those that must be 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.

While performing the duties of this Job, the employee is regularly required to use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is frequently required to stand; walk and sit. The employee is occasionally required to stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

Frequent talking to convey detailed or important instructions or ideas accurately, persuasively or quickly.

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is occasionally exposed to moving mechanical parts. The noise level in the work environment is usually quiet.