



## POSITION DESCRIPTION

**Department:** Corporate

**Title:** Chief Growth Officer

**Reports To:** President/CEO

**FLSA Status:** Exempt

**Created Date:** September 22, 2022

**Created By:** Maci Tucker

**Supervises:** Sr. VP of Member Experience, Sr. VP of Commercial Services, VP of Lending

### Position Summary

Provides overall direction and oversees the management of all lending and operational areas of the Credit Union, to include consumer, mortgage, indirect, commercial and branch services/central services of the credit union. Responsible for the creation of a sales culture that ensures members are exposed to and encouraged to utilize the products and services of the credit union. Serves as staff liaison to the Board Loan Review Committee, collaborating/recommending action on new loan products and services, interest rate changes, loan promotions, and assists in developing financial goals and expectations. Reviews all employee and official family loan requests. Creates programs and services that meet the needs and desires of the credit union's membership. Monitors and ensures compliance with all policies, procedures, laws and regulations impacting the credit union.

Develops and implements delivery system strategies and programs to reach organizational objectives. Achieves efficient branch operations by standardizing sound operating principles and implementing effective service technologies. Fosters a sales and service culture which consistently presents and educates our membership on features and benefits of our products and services. Directs the Central Services Branch of call center employees, the Outbound Department and the electronic delivery channel to ensure representatives provide quality and efficient service and support to members. Establishes and analyzes metrics that focus on improved performance and processes. Monitors effectiveness and progress, implementing creative solutions based on membership needs, resources, and credit union objectives.

This position requires the individual to provide detailed information on Home Equity and/or Mortgage Loans; therefore, NMLS registration will be required. If the individual is not currently registered, they will need to pass the applicable background screening to be registered. This screening may be different than what was required for the individual to become employed by the Credit Union.

### Education / Experience

Bachelor's degree in business, finance, accounting, or other business concentration preferred  
experience that is directly related may be matched year for year in place of educational requirement  
5+ years' experience in a similar management position  
Experience in supervising directly or indirectly at least 20 employees  
NMLS registration required

### Requirements

Must be bondable and successfully pass background screenings  
Must be able to obtain/maintain required certifications/licenses applicable to position  
Must annually attend training and pass exams for compliance with the Bank Secrecy Act (BSA)

Must annually attend training and pass exams for compliance with the USA Patriot Act

Must annually attend training and pass exams for compliance with the Office of Foreign Asset Control

## Organizational Competencies

Title and Definition	Weight
<p><b>Team members are expected to live our Team 1 Culture in all facets of their position. This includes the four following competencies:</b></p> <ul style="list-style-type: none"><li>o QUALITY STANDARDS FOR EXCEPTIONAL SERVICE - Team Members are expected to act in accordance with and make decisions based on Security, Courtesy, Image, and Efficiency.</li><li>o VISION - Team Members are expected to exhibit growth through Engagement, Empowerment, and providing Extraordinary Experiences.</li><li>o COMMON PURPOSE - Our purpose is to "Better Lives through OUR PASSION to Serve . . ." This includes internally with fellow Team Members, externally with members and business partners, and outwardly with our communities.</li><li>o VALUES - Team Members are expected to display behaviors that support our core values: Trust, Care for Others, Accountability, Consistency, Collaboration, Integrity, and Commitment.</li></ul>	50%
<p><b>LEADER BEHAVIORS - Leaders are expected to encourage and assist in the success of their Team Members.</b></p> <p>Leaders who successfully demonstrate this competency do so by regularly providing their Team Members with individual feedback in a documented setting (i.e. "1:1 meetings"), coaching and training opportunities, opportunities to practice empowerment and engagement, and recognition for good performance. They also communicate the Credit Union's vision, changes, and expectations while demonstrating a 'purpose over task' approach and a good balance between being performance-minded and results-focused.</p>	50%

## Position Specific Competencies

Title and Definition	Weight
<p><b>Vision</b></p> <p>Has vision for the credit union that is supportive of the organization's mission and strategic goals. Works with the President and other Executive Management to coordinate efforts and make decisions in support of these goals. Works closely with Board Committee and executive management to develop branching and ATM opportunities. Monitors trends in the financial market and forecasts future operational needs of the credit union.</p>	20 %
<p><b>Overall Performance</b></p> <p>Responsible for/assists in the research, development, implementation, and ongoing execution of all products and services in the Growth areas. Ensures that activities are consistent with policy, that staff are thoroughly trained, and that service to members is of the highest quality. Maintains solid relationships with third party vendors, successfully negotiates pricing/contracts/service agreements that are in the best interest of the credit union. Monitors vendor performance to ensure quality.</p>	20 %
<p><b>Lending Objectives</b></p> <p>Works closely with Board Committees and executive management to develop successful Lending strategies. Monitors trends in the financial market and forecasts future needs of the credit union. Monitors employee and official family lending activities, ensuring strict adherence to governing regulations and policy.</p>	20 %
<p><b>Membership</b></p> <p>Develops and implements strategies for increasing membership, penetration of products/services through marketing efforts and branching strategies. Provides strong, technical advice and input into new and existing programs and services. Cultivates a service and sales environment within the Growth areas of the Credit Union.</p>	20 %
<p><b>Problem-solving Skills</b></p> <p>Possesses advanced knowledge of credit union operations, laws, and regulations. Works cooperatively with examiners and internal/external auditors. Answers questions in a knowledgeable, timely, and accurate manner. Demonstrates the ability to reach decisions promptly and implement appropriate actions. Continually looks for ways to improve department results, develop and implements procedures to ensure efficiency and overall effectiveness. Monitors the</p>	20 %

workflow and overall operational processes of member engagement areas. Resolves member needs, conflicts, and complaints when escalated from direct reports and high-quality member service.

## Physical & Environmental Working Conditions

This position is primarily sedentary in nature and is not substantially exposed to adverse environmental conditions. It requires the occasional lifting and/or carrying of small objects (no more than 30 lbs.). While mostly done sitting, a certain amount of walking and standing is necessary. Travel may be required.

### Essential tasks include:

- Typing/Keyboarding
- Sitting (prolonged)
- Reaching (extending hands/arms)
- Talking
- Hearing
- Repetitive Motion (of the wrists, hands, and/or fingers)
- Walking
- Grasping
- Visual Inspection (close)
- Function effectively under stress

### Marginal tasks include:

- Stooping/Crouching
- Standing
- Pushing
- Pulling
- Lifting (raising and/or moving objects)
- Feeling (perceiving attributes of objects by touch)

## Team Member Statement of Understanding

I have read and understand the position description for my job title. I am able to perform all of the competencies and tasks of this position.

As a team member, I will strive to embody the Quality Standards, Vision, Common Purpose, Values, and Leader Behaviors of Team 1. I understand I am expected to remain professional, courteous, and respectful in all interactions with members and my fellow Team Members.

Employee:	Jaynel Christensen J.C. (electronic signature for Chief Growth Officer (CGO))
Date (MMMM d, yyyy):	February 6, 2024 01:27 PM EST

Electronic confirmation: 9b382cc361aa1daafc427fedf97b52cc