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# Regional Director

Shared Financial Solutions

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Position Title: Regional Director

Department: Business Development

Classification: Exempt

Revision Date: 11/1/2021

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## Reporting Relationships

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Position Reports to: President of Shared Financial Solutions

Positions Supervised: None

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## Position Purpose

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To perform relationship management and deliver consulting services for member credit unions. Provide support, advice, and guidance to credit unions on all facets of credit union operations and strategic planning. Promote HCUA affiliation, generate sales, and increase penetration of HCUA products and services.

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## Essential Functions and Basic Duties

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1. Promote credit union affiliation.
  - a. Ensure maximum affiliation and retention of League membership by building and maintaining strong relationships with member credit unions in accordance with procedure and policy and at the direction of the Member Engagement Officer.
  - b. Establish and maintain a relationship management process for assigned credit unions.
  - c. Participate in chapter functions, networking groups, legislative support, and other HCUA activities that are designed to promote credit union cooperation and development.
  - d. Plan an active role in extolling the benefits of HCUA membership, use of SFS services, and system participation.
  - e. Assist with the collection of annual dues for assigned credit unions.
  - f. Advise HCUA management of all significant credit union trends to identify and accomplish team goals.
2. Perform consulting services for credit unions.
  - a. Perform operational and financial analysis, data collection and research for individual credit unions.
  - b. Provides recommendations and support for credit union financial integrity, growth and development.
  - c. Conduct planning seminars and assist credit unions with their business plan development.
  - d. Maintain technical proficiency by remaining current in all facets of credit union operations through internal and external training.
3. Increase the positive image of HCUA and usage of HCUA (and endorsed business partner) products and services to meet HCUA goals and objectives.
  - a. Anticipate, through strong relationship building, credit union product and service needs and communicate to appropriate HCUA departments and business partners.

- b. Act as liaison between the credit union and HCUA departments (and business partners) to coordinate effective use of products and conduct regular reviews of products that credit unions utilize.
- c. Make sales presentations on dues supported services and business partner opportunities to credit unions, credit union boards, other state leagues, and related organizations to explain and promote the use of HCUA products.
- d. Assist management in conducting business partner planning sessions and ongoing reviews of business partner relationships.

## Qualifications

- Education/Certification:**
- Bachelor's degree in business, accounting, finance, marketing or related field or equivalent experience that demonstrates a skill level equal to management of a mid-sized credit union.
- Required Knowledge:**
- Thorough understanding of Association products and services.
  - Thorough knowledge of the development, philosophy and structure of the credit union industry. Knowledge of credit union operations.
  - Thorough knowledge in sales, marketing, and promotion techniques.
  - Thorough knowledge of strategic planning.
- Experience Required:**
- Five to ten years of similar or related experience. At least two years of credit union experience preferred.
- Skills/Abilities:**
- Professional, well-developed interpersonal and communication skills necessary for interacting with and presenting to credit union personnel, board members, and serving as a representative of the Heartland Credit Union Association.
    - Maintain a high level of confidentiality and protect proprietary information in all activities.
  - Strong aptitude for consultative selling and negotiating.
  - Strong organizational, prioritization and verbal/written communication skills.
  - Strong computer and management information system skills are required.
  - Proficient at using Microsoft Word, Excel and PowerPoint. Must be able to do advanced spreadsheet applications.
  - The position requires a high level of interpersonal skills with the ability to influence individuals both inside and outside the organization. A high degree of tact and diplomacy is necessary.

## Physical Activities and Requirements

- Talking:**
- 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:**
- Walking of considerable distance is required. Some sedentary work; sitting most of the time. Exerts up to 50 lbs. of force occasionally.
- Travel**
- Extensive overnight travel, up to three nights per week, may be required

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(approximately 30% of incumbent's time). This may include prolonged driving/riding in a vehicle or air travel.

- Incumbent must have flexibility to work/travel on limited notice to attend chapter meetings, board of directors meetings, chapter outings, conferences, evening meetings, and/or to attend special presentations or training sessions in and out of state which could be as long as one to two weeks. After hours work schedules may be frequent since the schedule with assigned credit unions can be unpredictable.
  - This position requires a valid motor vehicle operator's license and a driving record that allows accumulation of up to 30,000 miles per year travel.
  - The above requirements are not all inclusive and the position may require travel/schedules other than listed above and as determined by management.
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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.