

**Senior Vice President, Chief Strategy Officer  
Allegacy Federal Credit Union  
Winston-Salem, NC**

Allegacy Federal Credit Union, founded in 1967, is one of the largest credit unions in North Carolina with members totaling more than 110,000 and approximately \$1 billion in assets. Allegacy was initially founded to serve the employees of R.J. Reynolds Tobacco Company, but today has grown to serve the employees, retirees and families of over 550 companies throughout the United States. Current sponsor companies include the two largest medical organizations in the southeast, three nationally prominent law firms, and a number of large, well-respected advertising agencies in New York City and North Carolina, as well as many technology businesses.

The primary purpose of this position is to assist Allegacy Federal Credit Union in living out its mission, “to help members make smart financial choices” and support the expected behaviors of the Synergy culture. To achieve this goal the employee must provide outstanding service to both internal and external members. One of the primary means to achieve this end is to develop a highly effective team of employees and develop each employee to their highest potential through coaching and leadership. Responsible for ensuring that outstanding service is delivered to both internal and external members. A key component of this service is to identify the financial needs of the member and recommend an appropriate credit union solution.

The Chief Strategy Officer serves as a member of the Executive Management Team to formulate and monitor the execution of corporate strategy and associated plans, programs, and projects in support of Credit Union’s vision, mission and goals; maintains a viable, integrated planning structure and process; ensures alignment of objectives between the Operating plan and long range plan; and counsels the Board of Directors and executive management on strategic planning for the Credit Union, CUSO and its subsidiaries.

**Specific Accountabilities**

Develop each employee to their highest potential by identifying their areas for improvement and appropriately coaching, training or correcting the employees’ performance.

- Recognize employees who perform at a high level.
- Hold employees accountable for their performance, attitude and behavior.
- Meet with each employee to review previous performance, set goals for performance and develop plans to improve employee’s performance.
- Responsible for exceptional member service to every member, every time by ensuring employees deliver consistently high quality service to both internal and external member that is in alignment with our Service Promises.

1. We promise to treat you with the respect deserving of a team member.
  2. We promise to find ways to offer simplicity and convenience.
  3. We promise to recognize your needs and recommend innovative solutions.
  4. We promise to ensure the security of financial information.
  5. We promise to take ownership of your request.
  6. We promise to express our appreciation for the opportunity to serve you.
- Demonstrate enthusiastic support of corporate mission, core values and long-term objectives. Performs job duties within our bylaws, regulations, Board of Directors policies, established internal and external service standards and our work procedures.
  - Train and supervise staff. Assign, direct, coordinate and review work performed by staff.
  - Must possess effective knowledge of the credit union's products and services.
  - Drive financial and business results by working in a synergistic manner with the Presidents of the business lines to define and implement corporate strategy
  - Oversee and supervise the Project Management Office (PMO).
  - Create a planning model that supports the organization's mission and values based on internal and external needs.
  - Research, oversee and conduct the Credit Union Long Range Planning process.
  - Assist in the research, development and implementation of the:
    - Investment Planning Group's Long Range Plan
    - CUSO Long Range Plan
    - Allegacy Technology Plan
    - Allegacy Human Resources Plan
  - Coordinate all credit union businesses' long range planning in order to achieve corporate strategic initiatives and overall mission.
  - Manage and oversee the innovation process in the Credit Union (Conduct research and development on products and services, eliminate rarely used services, research and implement product improvements).
  - Manage and oversee the regulatory compliance officer.
  - Analyze the external and internal environment of the Credit Union and establish standards and strategies based on these analyses.
  - Supervise the process of maintaining essential corporate documents and historical information including: Charter; Bylaws; Policies Manual; Procedures; Performance Metrics.
  - Serve as a strategic liaison for key organizational initiatives between all divisions and their internal/external customers.
  - Assess current models of business operations and develop appropriate new models as needed with the cooperation of team members.
  - Responsible for maintaining effective communication of the Credit Union's vision, mission, and strategic plan to all stakeholders: Board of Directors, employees, members, the Credit Union's community, outside organizations and appropriate regulators and legislators

**QUALIFICATIONS:**

- Prior management experience in strategic planning in a non-profit setting.
- Seven to ten years relevant experience in a financial institution.
- Excellent leadership and management skills.
- Proven ability to work collaboratively in a team environment.
- Superior strategic thinking skills, with experience in developing strategies to achieve organizational goals.
- Ability to work in a change-oriented environment.
- Excellent organizational and time management skills.
- Process oriented with project management experience. Able to analyze current processes, suggest and define improvements, and implement them with a group.
- Must be very member focused. Able to provide world-class service to our internal and external members.
- Strong analytical skills with the ability to synthesize complex and diverse information, as well as collect and research data.
- Excellent verbal and written communication skills.

**EDUCATION/CERTIFICATION:**

Bachelor Degree in business related field required, or equivalent experience. MBA Preferred.

**EXPERIENCE REQUIRED:**

Minimum 7 years of experience in Financial Institution Management (credit union management experience preferred) with specialty in Strategic Planning, Marketing, Finance, Advertising or Sales

**SKILLS/ABILITIES:**

Strong leadership and interpersonal abilities  
Solid organizational and analytical skills  
Ability to coordinate, manage, and direct others

**Contact:** Kirk Gove at (800) 574-8877, ext. 105 or [kgove@ddjmyers.com](mailto:kgove@ddjmyers.com)