



VP of Marketing & Business Development

Employee:		Department:	Senior Management
Reports To:	President / CEO	FLSA Status:	Exempt
		Updated:	January 2024

SUMMARY: In support of Sun Federal’s mission, vision, values and culture, the VP of Marketing & Business Development has senior leadership responsibility for Marketing, Business Development, and Wealth Management at Sun Federal. Provides leadership focus for Sun Federal’s unique cooperative brand image, integrating all communications and representations to ensure our mission and values are supported and upheld. As a member of the Senior Team, actively participates in organizational vision setting and the development of the annual Strategic Business plan. Creates and maintains a high level of cultural engagement (employee & member) among work teams and across the organization. Trains, directs, develops and evaluates assigned staff. Influences employees by clearly communicating and upholding the Credit Union’s mission and core values. Leads by example in carrying out the Credit Union’s cultural expressions on a daily basis. Works to maintain high employee engagement and is a cultural champion.

ESSENTIAL DUTIES AND RESPONSIBILITIES: *Must effectively carry out the essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission and core values in a positive manner. Other duties may be assigned.*

1) Marketing

- a) Leads the Marketing Department and all marketing and member communications related functions and initiatives.
- b) Creates the strategic marketing vision with measurable goals and strategies to sustain the Credit Union’s long-term growth objectives.
- c) Oversees the development of the annual marketing plan, strategies, tactics and resources necessary to achieve the Credit Union Strategic Business Plan and product and services goals. Designs and implements measurable and effective promotions and campaigns.
- d) Conducts marketing research and study on current and new product concepts and provides leadership, recommendations, creative guidance, and feedback towards the design, positioning, development, pricing, implementation and packaging of new and existing product and service lines to achieve the credit union’s mission and goals.
- e) Oversees business intelligence analysis and reporting including member research, demographics, segmentation, targeting and engagement.
- f) Researches, analyzes, and monitors financial, technological and social/demographic factors to leverage market opportunities and competitive advantage. Creates and directs member related surveys and

market research efforts to capture and better define member needs and the overall effectiveness and impact of credit union message, promotions, products and services.

- g) Develops and manages the marketing budget. Plans and oversees advertising and promotion activities to ensure effectiveness and achieve results.
- h) Establishes and maintains an integrated and consistent Sun Federal Brand image and message, across all service lines/divisions and touch points including all product lines, promotional materials, websites, applications, facilities and events.
- i) Represents Credit Union at community, SEG/Sponsor, social, and business gatherings. Participates in associations and trade groups.
- j) Serves as the primary media contact, issues public statements and manages and coordinates all public-facing communications. Manages the drafting and review of communications sent outside the Credit Union, including FAQs for internal use.
- k) Manages key vendor relationships.
- l) Plans, organizes and oversees all activities involving the membership annual meeting, including evening events, notices, reports and board elections.

2) Business Development

- a) Responsible for credit union wide strategic focus of the Business Development program, recruiting new groups and connecting with communities in alignment with Sun Federal's mission and values and cultivating depth of relationship within existing partners.
- b) Collaborates, coordinates and tracks Business Development activities/outcomes between CU, Sponsor Groups, communities, and other groups.
- c) Oversees the development of the Business Development Annual Business Plan encompassing all related financial implications, expenses and outcomes.
- d) Oversees the development, management and overall usage of member and Sponsor Group database.
- e) Member Financial Education:
 - a. Responsible for Credit Union-wide strategic focused and member-driven financial education.
 - b. Leads and collaborates with Business Development, Branch Operations, Wealth Management and Business Services to ensure coordinated planning and integration across the entire credit union ensuring in-house experts/trainers/facilitators are well prepared to interface directly with individual members, small member group settings and Sponsor Group settings.
 - c. Oversees the selection, development and implementation of high impact financial literacy designs and curricula appropriately relevant for the particular setting such as: individual member, small member groups, Sponsor Groups and Wealth Management settings.

3) Wealth Management

- a) Develops strategic and tactical business development plan and budget for Wealth Management.
- b) Ensures prudent management of the Wealth Management program. Develops and monitors the delivery experience, systems and processes used. Determines the guiding strategies and responds to changing economic conditions to meet established goals.
- c) Ensures staff and department compliance with all applicable policies, rules and regulations.

PERFORMANCE MEASUREMENTS

1. Marketing functions, Business Development initiatives and Wealth Management services are efficient, effective and delivered in accordance with Credit Union policies, procedures, budget and regulatory guidelines.
2. Marketing programs and Business Development initiatives are regularly reviewed and revised as needed. Marketing and Business Development activities effectively complement and support Credit Union strategies and goals.
3. Marketing functions are well coordinated with branches and related departments. Assistance is provided as needed.
4. All reporting staff and areas of responsibility are effective, efficient, and optimally utilized. Good communication exists with area personnel.
5. President/CEO is appropriately informed of Marketing, Business Development, Wealth Management and Financial Literacy activities and of any significant problems. Suggestions for improved efficiency or effectiveness are provided. Required reports and records are accurate and timely.
6. The Credit Union's professional reputation is maintained.

Expectations for Leadership Team

- 1) Supports, creates organizational awareness and models Sun Federal's mission, vision, values and culture. Accepts responsibility to live Sun Federal's culture.
- 2) Positively influences others by demonstrating competency in Sun Federal's Leadership Expectations: Instilling a Shared Vision, Strategic Agility, Emotional Intelligence, Communication Skills, Business Acumen, Relationship Skills, Developing Individuals & Teams and Service Orientation.
- 3) Actively models Sun Federal's service behaviors and coaches' employees to consistently follow them.
- 4) Shows professionalism, empathy and respect in all interactions with members, internal and external.
- 5) Takes personal responsibility to actively listen to the members, understand their needs and take initiative to help the member as priority. While some have little direct member contact, every position at Sun Federal supports the member.
- 6) Responsible for personal development through training, collaboration and teamwork. Understands and adheres to all policies, procedures and regulations. Maintains knowledge of regulations appropriate for position (i.e. Bank Secrecy Act, OFAC, etc.) and attends all training as it relates to position related regulations.
- 7) Adheres to Sun Federal's security procedures and safeguards member information.
- 8) Demonstrates professionalism in dress, tone, flexibility and communication.
- 9) Consistently acts as part of a cohesive team, demonstrating excellent interpersonal skills and the ability to interact positively with other employees. Maintains open and respectful communication with other departments. Handles conflict directly and discreetly.
- 10) Collaborate, contribute, and communicate for the success of the team. Invite and accept feedback from others and provide upward feedback.

QUALIFICATION REQUIREMENTS

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

EDUCATION/CERTIFICATION:	Bachelor's degree in business administration, marketing, finance or management required. A master's degree in business administration, or other applicable advanced degree or certification is preferred.
REQUIRED KNOWLEDGE:	Thorough knowledge of Credit Union industry. Thorough understanding of Credit Union products and services. Strong background in financial marketing and promotion techniques. Familiarity with related laws and regulations.
EXPERIENCE REQUIRED:	Eight to ten years of related progressive experience, preferably in a financial environment.
SKILLS/ABILITIES:	Excellent communication, interpersonal and supervisory abilities. Strong project management skills. Solid leadership abilities. Organizational and analytical skills.

PHYSICAL ACTIVITIES AND REQUIREMENTS

TALKING:	Especially where one must frequently convey visionary, relational and/or detailed or important information accurately, and with the utmost sensitivity and grace.
AVERAGE HEARING:	Able to hear average or normal conversations and receive ordinary information.
REPETITIVE MOTION:	Movements frequently and regularly require 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:	Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally. (Almost all office jobs.)

WORKING CONDITIONS	No hazardous or significantly unpleasant conditions (such as in a typical office). Frequent local travel. Frequent out-of-town travel.
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MENTAL ACTIVITIES AND REQUIREMENTS

REASONING ABILITY:	Ability to apply principles of logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions. Able to deal with very difficult concepts and complex variables. Able to interpret an extensive variety of technical instructions and can deal with several abstract and concrete variables.
MATHEMATICS ABILITY:	Ability to compute discount, interest, profit, and loss; commission markup and selling price; ratio and proportion and percentage. Able to perform very simple algebra.
LANGUAGE ABILITY:	Ability to read, journals, manuals, dictionaries, thesauruses, financial reports and legal documents.

Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style.
Ability to conduct training, communicate at panel discussions, professional presentations and before an audience.

JOB DESCRIPTION INTENT & PURPOSE

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 managers 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. Sun Federal maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

Employee Signature

Date