ASCENTRA CREDIT UNION
JOB DESCRIPTION

JOB TITLE: CHIEF TECHNOLOGY AND INNOVATION OFFICER

FLSA STATUS: EXEMPT
REVISED DATE: 11/02/2026

REPORTS TO: PRESIDENT/CHIEF EXECUTIVE OFFICER

SUPERVISES: VICE PRESIDENT INFORMATION TECHNOLOGY NETWORK & SYSTEMS
ASSISTANT VICE PRESIDENT DATA ANALYTICS
VICE PRESIDENT APPLICATIONS

PRIMARY FUNCTION:
This position exists to be accountable for all aspects of the credit union's Information Technology disciplines of hardware, software, information security, core processing, digital banking, and data analytics. This includes planning, implementing, maintaining, and securing all systems. This position is responsible for ensuring the integrity, flexibility, and safety of the credit unions on site and cloud-based computing environment. Provide strategic, technical, and innovative direction in the planning, development, evaluation, and coordination of all information technology systems based on short and long-term goals. As a credit union leader, the ability to communicate professionally and effectively with all staff and levels of management is of great importance.

PRINCIPAL DUTIES/RESPONSIBILITIES:
1. Research and assess improvement opportunities regarding all credit union technology platforms, structure, practices, and processes. Identify innovative technologies and trends and determine applicability to the organization's future goals.
2. Provide leadership in the development of systems security to ensure compliance with financial, regulatory and industry requirements. Ensure business continuity through the appropriate allocation of resources and budget to the maintenance and development of the IT Disaster Recovery environment and plan.
3. Oversee all data processing operations.
4. Provide communication and education to the staff and membership on implementation of new technology, and other applicable technological enhancements and changes.
5. Appropriately identify, evaluate, and mitigate risk within information technology and implement risk mitigation strategies and activities as needed.
6. Provide Financial Data Management for information systems, staff, cost-benefit analysis, workforce planning, and ROI. Define and implement common reporting mechanisms to ensure transparency.
7. Seek and develop expert knowledge and insights about technologies and practices that ensure effective and competitive business services.
8. Lead ongoing project management within the IT department and implement effective and efficient collaboration and productivity.
9. Serve as liaison between the credit union and outside vendors with regards to technology and negotiating contracts.
10. Inform and advise members, staff, and board of directors on issues critical to the performance of business services and the credit union. Constructively contribute and take initiative of new ideas and innovations to help the credit union grow.
11. Actively participate on various credit union committees and assignments.
12. Ability to successfully perform the duties, responsibilities, and functions of the departments and positions overseen and train employees to successful performance in job duties, responsibilities, and functions.
13. Responsible for communicating expectations, defining goals, coaching, and developing, recognizing success and evaluating performance and behavior of their direct reports.

GENERAL DUTIES/RESPONSIBILITIES:
14. Promote products and services.
15. Promote a professional image of the credit union.
16. Attend all meetings as required.

17. Maintain clean and professional work area and appearance.
18. Maintain positive public relations and promote credit union within the community.
19. Complete educational programs as required.
20. Perform the following commitments of service to each member at all times:
    a. Make a good first impression, be dressed professionally and greet people with a smile and a firm handshake.
    b. Keep a smile in my voice as well as on my face.
    c. Answer the telephone by the third ring.
    d. Call people by name and thank them.
    e. Give people my full and undivided attention; focus on the person face to face and on the telephone.
    f. Take responsibility for solving the individual's problem instead of referring it to someone else.
    g. Deliver on commitments of action(s) to be taken, so excuses won't be necessary.
    h. Follow through on necessary action(s) to be sure the problem is solved.
    i. Know that what's important is not only who or what created the problem but how the problem can be corrected.
    j. Protect confidential information.
21. Other duties as assigned.

REQUIREMENTS OF THE POSITION:
- Bachelor's Degree in Information Technology or related field.
- Ten years previous experience.
- Relevant industry experience in the financial services field.
- Extensive experience leading multi-functional teams and a track record of delivering major programs that achieve positive, measurable results.
- Experience in financial electronic transfer systems.
- Working knowledge of applicable laws and regulations.
- Ability to perform under pressure.
- Excellent problem-solving skills.
- Excellent organizational skills.
- Excellent oral and written communication skills.
- Ability to work with little supervision.
- Excellent analytical skills.
- Excellent decision-making skills.
- Thorough knowledge of all credit union operations.
- Team player.

PHYSICAL REQUIREMENTS:
Medium work – Exerting up to 50 pounds of force occasionally, and/or up to 30 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

PHYSICAL ACTIVITIES:
The following physical activities will be required on a day-to-day basis: climbing, stooping, crouching, reaching, walking, pulling, fingering, feeling, hearing, balancing, kneeling, crawling, standing, pushing, lifting, grasping, talking, repetitive motions.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative, and reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions if they are otherwise qualified.

VISUAL/PERCEPTION ACTIVITY:
Administrative, Clerical, Data Entry operators, Inspection, (work at distances close to the eyes).

WORKING CONDITIONS:
None. The worker is not substantially exposed to adverse environmental conditions.

CHIEF TECHNOLOGY AND INNOVATION OFFICER

HUMAN RELATION SKILLS NEEDED:
Ability to communicate effectively with members, staff, and contacts outside of the credit union in a timely, accurate and efficient manner.

ANNUAL TRAINING REQUIREMENTS:
Compliance and Regulatory (BSA, OFAC, etc.)
Security Awareness Training
Diversity, Ethics, Sexual Harassment, and Sensitivity

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Employee Acknowledgement Date