



Accounting Coordinator

Reports to: CEO
Department: Finance
Job Level: E

Location: Churchbridge, SK
Date Revised: November 15, 2021
Covers for: Accounting Assistant

Purpose of Position:

This position is primarily focused on providing support and service to internal clients, ensuring the effective and efficient co-ordination of information. The Accounting Coordinator will work towards the achievement of Churchbridge Credit Union goals and objectives by providing high quality accounting and administrative support, under supervision of the CEO. This position performs a variety of moderately complex accounting functions as well as lending support and administrative aid to credit union personnel.

Currently this position will complete the Accounting Assistant duties 50% of the time and will cover for the Accounting Assistant during absences. The remaining time in the position will be spent on more complex accounting functions. The goal of the candidate in this position will be to advance their skills and education in order to assume the balance of complex accounting duties that are currently outsourced.

The Accounting Coordinator will be responsible for ensuring activities are in compliance with all sound business practices, legislation, regulations, by-laws, policies, and procedures.

Key Responsibility Areas:

Accounting Support Services

- Conduct all day-to-day accounting functions and tasks for the credit union.
- Maintain, monitor, and reconcile various general ledger (GL) and holding accounts; prepare and process required accounting entries and month-end adjusting entries as required.
- Work with staff to resolve any issues or errors; work to develop procedures to ensure errors are infrequent and work processes are improved.
- Working practical knowledge of reporting systems such as DRVA, CORS, FAS and C-view.
- Gather and present information to the Asset-Liability Committee (ALCO) and follow through on ALCO committee investment instructions.
- Be the “point of contact” for our third-party finance department.
- Process interest rate changes as directed by the CEO.
- Support the day-to-day cash management and forecasting.
- Provide back-up support in managing and monitoring investments and borrowings.



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- Assist in preparation and production of support documents and files for month-end and year-end financial statements and regulatory reports.
- Assist in identifying any areas of financial concern for the credit union.
- Ensure the safekeeping of records to meet the requirements of outside regulatory bodies. Ensure that a systematic process is in place for their retention and disposal.
- Assist in the management of the relationship and acts as liaison between the credit union and its external auditors and regulators when required.
- Input and administration of exchange rates.
- Prepare and maintain government remittances/filings, accounts payable, and other similar transaction.

Administration Support Services

- Adhere to all security standards as they relate to the position including specified combinations.
- Provide overall administrative support services to the credit union.
- Administer the Records Management Framework regarding the retention and destruction of records across all branches.
- Review administration, department and position procedures and guides as required.

Service Excellence

- Participate in the Pelmetta TEAM and Heart of Coaching programs by utilizing the skills and knowledge from these programs in your everyday duties to provide excellent internal and external member service.
- Maintain a general understanding of credit union products and services and relevant policies and legislation by regularly reviewing literature and attending informational meetings.
- Differentiate between credit union and competitors' products and services
- Appropriately promote the credit union and its products and services during off hours.
- Provide support in the tracking of targets or marketing efforts.

Department, Branch, and Credit Union Support

- Work effectively with fellow employees, share ideas and information and support the development of peers and credit union objectives.
- Actively participate in department, branch, and credit union meetings.
- Work to meet the strategic objectives as established annually by the Credit Union Board of Directors.
- Complete all Annual Compliance and other assigned training and comply with all regulatory requirements including Market Code, Anti-Money Laundering (AML), Privacy, and Code of Conduct.
- Provide backup support, training, and assistance in problem solving to team members as required.



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- Continual improvement of self and team by utilizing TEAM, Heart of Coaching, and the Winning Way.

Decision Making and Freedom to Act

Under general supervision, guided by established standards and procedures, the work is varied and occasionally complex. Normal decision making is required with the use of some judgement amongst a wide variety of guidelines.

Qualifications:

Skills:

- Strong computer literacy including effective working skills of Microsoft Word and Excel
- Strong written and interpersonal communication skills dealing with a variety of team members.
- Willingness to learn and continually build their technical and professional knowledge
- Goal orientated
- Strong analytical, problem solving, organizational and time management skills.
- Attention to detail
- Ability to learn quickly
- Work independently
- Organization

Experience:

- Successfully obtained an Accounting Diploma from a recognized business program with the desire to achieve a Bachelor's Degree in Commerce with a major in Accounting.
- Minimum 2 years of accounting related experience
- Working knowledge of trial balances, general ledger (GL) databases, financial statements close processes and accounting matters
- Understanding of payroll, bookkeeping and record keeping practices
- Advanced Excel knowledge.

Training Requirements:

- CUIC 201 – The Credit Unions: Different by Design
- CUIC 185 – Products & Services
- Heart of Coaching
- Sales and Service Program course
- Continuing education to complete Bachelor's Degree in Commerce with a major in Accounting.
Assistance with cost of education to be discussed.

Note: this job profile is not intended to be all-inclusive. Employees may perform other related duties as negotiated to meet on-going needs of the organization.



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To apply for this position please send your resume by **November 30, 2021**, to the attention of:

Ryan Tebbutt, CEO
Churchbridge Credit Union, Churchbridge Branch
Box 260, Churchbridge, SK S0A 0M0
rtebbutt@churchbridgecu.ca

Only individuals who have been selected for interviews will be contacted.



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About Churchbridge Credit Union

The Churchbridge Credit Union is a member owned co-operative that offers a full range of financial products and services to our members. Our credit union was formed in 1945 and has branches in Churchbridge and Langenburg.

Churchbridge Credit Union recognizes our employees as a cornerstone of our credit union. We do much more than offer jobs to our employees: we offer them an opportunity to build a career. Our employees are part of a team of financial service professionals dedicated to providing quality financial solutions to meet the needs of our members. As a team, our employees work collaboratively toward our common goals, while ensuring the credit union's values and cooperative principals are followed.

Our Purpose

We strive to be progressive and dedicated, ensuring our members and our communities are our top priority.

Our Values

Churchbridge Credit Union believes in integrity, community involvement, innovation, teamwork, providing excellent member service, supporting our staff, and the cooperative principles.

Co-operative Principles

As a true co-operative financial institution, Churchbridge Credit Union acts in accordance with internationally recognized principles of co-operation:

Voluntary and Open Membership

Co-operatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.

Democratic Member Control

Co-operatives are democratic organizations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary co-operatives, members have equal voting rights (one member, one vote) and co-operatives at other levels are organized in a democratic manner.

Member Economic Participation

Members contribute equitably to, and democratically control, the capital of their co-operative. At least part of that capital is usually the common property of the co-operative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all of the following purposes: developing their co-operative, possibly by setting up reserves,



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part of which at least would be indivisible; benefiting members in proportion to their transactions with the co-operative; and supporting other activities approved by the membership.

Autonomy and Independence

Co-operatives are autonomous, self-help organizations controlled by their members. If they enter into agreements with other organizations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their co-operative autonomy.

Education, Training and Information

Co-operatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their co-operatives. They inform the general public - particularly young people and opinion leaders - about the nature and benefits of co-operation.

Co-operation among Co-operatives

Co-operatives serve their members most effectively and strengthen the co-operative movement by working together through local, national, regional and international structures.

Concern for Community

Co-operatives work for the sustainable development of their communities through policies approved by their members.

Learning and Development

We are committed to ensuring our employees reach their fullest potential. We provide specialized and on-the-job training to new and existing employees, as well as the opportunity for staff to enroll in formal education and professional accreditations through universities or colleges. An annual personal performance plan and ongoing coaching is provided to each employee to ensure both job satisfaction and the highest quality service to our members.

Compensation

We offer competitive compensation and a comprehensive benefits program, which includes the following items:

- Our compensation package includes a fixed base salary, as well as a variable pay plan (profit sharing program).
- Each position in the credit union has a salary range that makes up the fixed base pay. Placement in the salary range of a position is based on an individual employee's knowledge, skills, and abilities. Annually the Churchbridge Credit Union follows recommended increases from SaskCentral to ensure that our compensation levels for all positions remain competitive in the marketplace.



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- With our variable compensation program, we consider our corporate and your personal goals to help our organization grow. This program allows everyone to share in the organization's success and encourages ongoing employee development.

Benefits

Insurance, Health, and Dental

Churchbridge Credit Union offers a full array of benefits and programs for our employees, including:

- Life & Accidental Death and Disability insurance for the employee and their dependents, employee paid;
- Optional additional Life & Accidental Death, Disability insurance, and Critical Illness insurance for employee and dependents, employee paid;
- Short- and long-term disability, employee paid;
- Health, dental, and vision coverage: 90% paid by the employer (based on FTE);
- \$25,000 Critical Illness insurance, 90% paid by the employer (based on FTE);
- Second Opinion consult, 90% paid by employer (based on FTE);
- Employee Assistance Program (EAP) to our employees and their eligible dependents. This is a 24 hour confidential counselling and information service, 90% paid by employer (based on FTE);
- Benefits are available to eligible part time and casual employees.

Superannuation

We offer a defined contribution plan through [CSS Pension Plan](#) (Co-operative Superannuation Society) for all eligible employees after one year of continuous employment in the co-operative system.

Contributions range from 6-8% matched by the credit union, based on your eligibility and years of co-operative service:

- 1 – 10 years 6%
- 11-20 years 7%
- 21+ years 8%

The Co-operative Superannuation Society (CSS) was established in 1939 and is one of the oldest and largest defined contribution pension plans in Canada with over \$5 billion in assets. They've grown to serve over 300 employers and 50,000 current and past co-operative and credit union employees across Canada.

Vacation

Churchbridge Credit Union recognizes the importance of employee wellness and, as such, provides vacation leave to employee's as a period of rest away from the work environment. All full-time employees enjoy a minimum of three weeks paid vacation. Part time and casual staff receive vacation pay on each pay cheque or twice per year in June and December.



Years of Employment	Non-Management	Management
Less than 1 to 5 years	3 weeks	4 weeks
6 to 10 years	3 weeks plus 1 day per years of employment beyond 5 years	4 weeks plus 1 day per years of employment beyond 5 years
11 to 14 years	4 weeks	5 weeks
15 to 19 years	4 weeks plus 1 day per years of employment beyond 14 years	5 weeks plus 1 day per years of employment beyond 14 years
20 years and over	5 weeks	6 weeks

In addition, we offer 1 week unpaid vacation to all employees annually.

Sick Pay

Eligible employees of Churchbridge Credit Union will be provided sick leave for medical appointments, illness, or accident to an employee or their spouse, dependents, or parents. Three sick days per year are provided for family illness or appointments.

Accumulated sick leave credits are earned at the rate of 1.25 days per month for each month of employment (15 days per year for full time). Eligible part time and casual employees sick leave credits will be prorated according to time worked.

After 10 years of employment with Churchbridge Credit Union, if an employee has accumulated 120 hours of unused sick time, they are able to buy out 30 days of sick time for \$1000.

Variable Pay

Based on ROAA formula and as a percentage of earnings for each employee. Based on individual and corporate goals.

Other Employee Benefits

- Free service charges on personal chequing and savings accounts;
- Preferred borrowing interest rates for personal loans and mortgages at a government prescribed rate up to 3X their salary;
- Reduced loan fees;
- Bonus rates on eligible investments of up to 0.50%;
- Cell phone or cell phone reimbursement for eligible employees;
- Housing buyback program;
- Paid study days;
- Staff MasterCard at preferred interest rate;
- \$100 Annual Clothing Allowance for Credit Union Clothing;
- \$200 Wellness Spending Account;



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- Free parking;
- Discounted foreign exchange rate;
- Long Service Awards.

Commitment to Community

Our relationship with our members goes beyond providing comprehensive financial services and professional guidance; we are an organization that gives back to our communities and whose employees embrace cooperative social responsibility. Our employees are actively involved in improving the quality of life in our communities through fundraising and volunteer initiatives.

The Churchbridge Credit Union accepts many requests for donations and sponsorships throughout the year. We also are proud to support our local area through our Community Investment Program, which allows us to set aside 1% of our pre-tax profits on an annual basis for substantial donations to nonprofit organizations.

Dress Down Fridays is one of the ways our employees give back to our local charities. Each Friday, staff is permitted to dress in Credit Union branded clothing and jeans for \$1. These funds are then donated to local charities and service groups.

We also encourage our employees to volunteer at Churchbridge Credit Union sponsored events throughout the year. Churchbridge Credit Union employees are provided two paid days annually to volunteer for approved groups and functions during working hours.