



## POSITION DESCRIPTION

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Position: Branch Manager, Small Office

FLSA Status: Exempt

### Position Overview

Under general supervision, the Branch Manager manages, directs, and administers the operations and business development efforts of one of our three small credit union branch offices that offers a full range of services to current and potential members. This small office position level of management is for a staffing size of approximately 5-10 employees. Position reports directly to the VP of Membership Services.

### Essential duties and responsibilities:

- Present professionalism and teamwork, courteous and friendly attitude towards members, employees, and co-workers
- Assists with the overall direction of the credit union with specific responsibility toward the development Provides FSR and Teller services as business and schedule dictates
- Manages, coaches, supports, trains, and holds all Financial Services/Membership Services staff members accountable for operating and service success
- Ensures our FSRs are trained and available to support, educate, and assist the membership with the appropriate level of expert financial knowledge
- Issues and training needs are to be worked on with the HCU Training Coordinator on both an individual FSR basis need and as a whole FSR/Teller staff knowledge need
- Provides training and assistance to employees to ensure efficient and effective delivery of member services-must be available for branch staff
- Ensures the appropriate HCU culture of family, CU knowledge, and service to our member and our fellow staff members is maintained
- Will need to plan and assign work as directed, and perform appraisals of the work
- Responsible for disciplining and directing improvement plans for direct report employees
- Will address member and employee complaints to resolve issues with the appropriate level of support from HR and EVP
- Supports and assists the Head Teller with coordinating and leading the credit union's deposit and membership services functions from the front-line teller/cash services perspective
- May be asked to work directly with our leadership team and representatives of associated industries (i.e., SEG's) to evaluate and promote improved and expanded services in area
- Develops plans and schedules for the efficient use of materials, machines, technological equipment and employees resulting in outstanding service-delivery to our members and to our staff
- Assists with the review and analysis of production costs and processes related to all of the functions of a profitable membership services environment – enhancements and modifications made for improvement must be supported and implementation managed by this position
- Recommends budgets to management relative to the appropriate service tools, physical branch needs, human resource needs, and other costs of the branch operation
- Position is responsible for the ongoing and timely evaluation/feedback on the success of the direct report employees-conducting conducts performance appraisals, recommending promotions, awards/bonuses, reassignments, re-training, and related personnel functions
- Ensures that the Branch image is favorable, reflecting a sound and secure financial institution that employs prudent housekeeping procedures, safety measures, and provides a pleasant atmosphere for members, including privacy, confidentiality, and ease of use
- May be required to travel to other branch offices, as needed
- Other related duties and management level functions as might be required for the efficient and effective operation of the credit union, or as might be assigned from time to time by the credit union Senior leadership team



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### SUPERVISORY RESPONSIBILITIES:

Manages subordinate supervisors who supervise employees in the Teller area and will manage individual FSR Departmental staff at the office. Is responsible for the overall direction, coordination, and evaluation of these units. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws.

### PERFORMANCE STANDARDS:

The Branch Manager is expected to attain branch goals in our teller work, savings, lending, account relationships, transactions, and profitability. Productivity standards are determined from time to time to reflect the traffic, volume and market opportunities for the branch.

### Minimum Requirements:

- Bachelor's or Associate's degree in Business or related field preferred, along with 3-5 years of financial institution experience at a banking/supervisory level; or equivalent combination of education & experience required

### Competencies and Communication Skills and Abilities:

Ability to operate CRT unit to access the credit union's accounting system and member account information. Basic input, output, error correction, and general ledger account structure knowledge is essential to be able to perform the job.

Ability to communicate, in writing and verbally, as well as public speaking skills are necessary in this role. The ability to manage in a smaller office environment to ensure our HCU culture of employee engagement and member service excellence is required in order to be successful for this position.

### Work Environment:

- Required to drive frequently, to various outside organizations, potential commercial and/or individual locations, and various other sites
- Required to sit, stand, walk, stoop, kneel, crouch, or crawl. Ability to use hands and fingers, handle, or feel objects, tools, or controls, reach with hands and arms. Daily use of PC. The noise level in the work environment is usually moderate.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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Employee printed name and signature

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Date

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Direct Manager printed name and signature

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Date