

Cencap Federal Credit Union

Position Description

Branch Manager

Classification

Exempt

Reports to

Branch Operations Coordinator

Supervises

MSRI's, MSRII's and MSRIII's

JOB DESCRIPTION

Summary/Objective

The Branch Manager is responsible for the administration and efficient daily operation of a full service branch office, including operations, loans, product sales, customer service, and security and safety. Retains and develops new account and loan business; promotes all products and services of the Credit Union; provides a superior level of customer relations and promotes the sales and service culture through coaching, guidance and staff motivation. Provides leadership, training and supervision; delegates day to day operations to the MSR's. Participation in community events to increase the Credit Union's visibility and to enhance new and existing business opportunities.

Essential Functions

1. Ensures the branch and vaults are opened and closed on time daily.
2. Enforces dual control procedures at all times.
3. Facilitates teller buys and sells to the vault.
4. Balances vaults, coin machines, taxes, FICA, etc.
5. Audits teller drawers.
6. Maintains monthly branch efficiency logs.
7. Assists new tellers with training as needed.
8. Oversees teller duties and assists line with customer transactions during peak periods.

9. Keeps staff informed of pertinent changes in operational policy and procedures.
10. Prepares teller performance appraisals and disciplinary notices as required.
11. Performs pre-audits to ensure ongoing adherence with compliance procedures.
12. Keeps educated on all deposit, business and consumer loan products.
13. Serves as a Loan Processor; conducts loan interviews; processes loans (completing paperwork and dispersing funds) and handling any loan problems.
14. Maintains proper activity of coin and ATM machines reporting any issues to the Branch Coordinator. (Terry Square Specific: ATM area and coin machines are to be cleaned daily and coin machines are to be balanced weekly on Monday, Wednesday and Friday.)
15. Performs all member wire transactions as well as opening accounts, issuing certificates of deposit and IRA accounts, wire transfers, business accounts.
16. Cross-sells Credit Union products and services providing members and/or potential members with information to allow them to make informed decisions.
17. Maintains adequate supplies at the facility.
18. Maintains proper teller and vault cash levels, including ordering coin and currency.
19. Ensures excellent customer service skills are practiced by all the teller staff members.
20. Maintain necessary regulatory knowledge to perform duties, including but not limited to, BSA compliance.
21. Meets with staff regarding branch security and safety issues.
22. Facilitates meetings to disseminate operational information.
23. Ability to travel between the branches and to work at other branches as needed.
24. Market and publicize new and existing products and services introduced by the credit union.
25. Builds / Sustains relationships within the community.
26. Ability to work additional hours as needed, including coming in early or working late when necessary as identified by the CEO.
27. Other duties as assigned.

Competencies

1. Member focus
2. Business acumen

3. Ethical conduct
4. Proficient communication
5. Excellent decision making skills
6. Results driven
7. Accurate mathematic skills
8. Proven record of dependability
9. PC Proficient
10. Ability to interact with members and subordinates in a friendly, professional manner
11. Able to operate under stress and maintain composure
12. Ability to train, discipline and coach employees as needed

Required Education and Experience

1. High school diploma or equivalent.
2. Customer service experience required.
3. Two or more years Teller experience required.
4. 2 or more years of supervisory or managerial experience required.

Preferred Education and Experience

1. Proven ability to interact with all levels of the organization.
2. Bachelor's Degree in Finance, or equivalent years' work experience.
3. Experience in Marketing.

Work Environment

This job operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines. Ability to lift 35 lbs. This is a salaried position.

Physical Demands

This position requires manual dexterity, the ability to lift files and open filing cabinets. This position requires bending, stooping, squatting or standing as necessary. Ability to lift 35 pounds.

Additional Eligibility Qualifications

1. Bi-lingual capabilities including Spanish are a plus.

Travel

Often (to events including after hour events, seminars, between branches and/or Corporate Office).

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Signatures

This job description has been approved by all levels of management:

Branch Coordinator _____

Human Resource _____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____

cc: Personnel File

cc: Employee