



COMMUNITY FIRST FUND TEAM MEMBER PROFILE

Date: 09/2021

Name: Vacant

Position/Title: Branch Manager

Department: Credit Union Reports To: Vice President, Credit Union Operations

Salary Band: Management & Oversight

CHARACTERISTICS

- Customer focused
- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Adaptable and Strategic Leader
- Ethical
- Goal Oriented
- Friendly
- Conscientious
- Self-starter
- Self-awareness
- Learning mindset
- Performs well in a fast paced work environment
- Supportive
- Curious
- Creative
- Outgoing

SKILLS

- Proficiency in Microsoft Products.
- Capacity to learn Credit Union software systems, including but not limited to Customer Relationship Management and cloud based programs like Microsoft 365 and Power BI.
- The ability to maintain a high degree of accuracy and attention to detail.
- Passion for member services.
- Ability to work independently.
- Public speaking
- Strong written and verbal communication skills.
- Strong analytical skills.
- Ability to work effectively with racially and socially diverse individuals.
- Ability to speak and write Spanish required

EXPERIENCE

- Bachelor's degree or commensurate experience in finance, or business.
 - 5+ years in Credit Union member development, recruitment, marketing, and bank retail services
 - 3+ years of supervisory experience
 - 3+ years of community outreach experience
 - General knowledge of business and management principals
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ROLE: Branch Manager will drive branch towards strong economic performance including: achieving branch goals and budgets. The manager will lead by example in delivering outstanding member service, opening new accounts, originating and processing loan, and supporting in the teller service areas as needed. Ensure members leave feeling they are our number one priority. Treating all internal and external members with respect and courtesy. Leads Member Service and Teller Team.

RESPONSIBILITIES:

1. **Branch operations**
2. **Policy and procedures**
3. **Oversee the physical facilities and equipment of the branch**
4. **Credit authority. Work within assigned credit authority to approve or deny loans as directed by credit union policy and procedures.**
5. **Leadership and management.**
6. **Individual, Team and Company Participation**

EXPECTATIONS:

1. **Branch operations**
 - a. Develop branch level production goals
 - b. Develop branch level budget
 - c. Develop branch level operating plans
 - d. Oversee the achievement of goals, budget, and operating plans
 - e. Maintain effective branch operations including operating hours and effective staffing levels
 - f. Maintain effective member services
2. **Policy and procedures**
 - a. Ensure adherence to operational policies, procedures, and controls
 - b. Ensure the safety and security of employees, members, and credit union assets
 - c. Develop and execute action plans to improve operational policies and procedures
 - d. Develop and execute action plans to control and mitigate losses in operations
3. **Oversee the physical facilities and equipment of the branch**
 - a. Assure a safe, secure, and clean facility
 - b. Work with identified vendors to maintain the physical facility and equipment
 - c. Oversee facility modification or expansion

4. **Credit Authority**

- a. Understand and remain current on rules and regulations covering credit union lending
- b. Work within assigned credit authority to approve or deny loans
- c. Recommend changes and improvements to the policy governing credit authority

5. **Leadership and management**

- a. Provides day to day supervision, training and evaluation to members of the credit union team.
- b. Ensures all staff are adequately trained to perform requisite duties
- c. Provides inspirational leadership consistent with our mission
- d. Adheres to supervisory requirements including recruitment, coaching, and other policy oversight
- e. Provide coverage for staff as directed
- f. Participates in strategic planning efforts

6. **Individual, Team & Company Participation**

- a. Quarterly Coaching Sessions and Annual Review Meeting
- b. Department Meetings
- c. Provide coverage for the Credit Union as directed
- d. Opportunities Meeting, Quarterly Business Meeting as directed
- e. Participate in training, assessments and surveys as directed
- f. Special Events Attendance & Support

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a limited geographic area is required approximately 25% of the time. Employee must have transportation in order to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.