

# White Rose Credit Union

## Job Description

**Position:** Branch Manager

**Reports to:** Member Service Vice President

**Purpose:** Guide and manage branch office in providing quality service to members in account transactions, loan applications, new accounts, and solving problems within established policies and guidelines.

**Duties/Responsibilities:**

1. Maintain a highly motivate, well-trained staff, maintaining effective employee relations.
2. Prepare, implement, and supervise the budget for the branch that is consistent with the overall strategic plan and budget of the credit union (such as overtime, staff lunch, supplies, subscriptions, etc.)
3. Represent the credit union to members in a courteous and professional manner and provide prompt, efficient and accurate service in the processing of transactions.
4. Apply and evaluate policies and procedures for the branch. Ensure that the branch is in compliance with state and federal laws set forth by the Pennsylvania Department of Banking, the National Credit Union Administration and other regulatory agencies.
5. Schedule and give performance reviews and recommend to the Member Service VP any necessary remediation.
6. Help ensure adequate staffing for efficient branch operations (lunch times, sickness, doctor appointments, days off, etc.)
7. Manage and recommend the purchase of equipment and supplies.
8. Ensure compliance with internal security controls.
9. Monitor branch activity, including number of transactions, volume, member service representative's errors, loan volume, member service representatives and loan personal sales, and new accounts.
10. Hold periodic staff meetings to discuss areas needing improvement, changes in procedures, new developments or services, and to present general information. Encourage the exchange of ideas.
11. Monitor key products/sales within branch to ensure profitable and sound business practices for the credit union, a high quality of service for members, and that branch staff are maximizing opportunities to sell products.
12. Manage the security and safety of the branch, with responsibility to analyze security and safety policies and procedures, and to alert staff of any changes.
13. Conduct loan interviews and close loans within the Credit Union guidelines as well as follow the guidelines in the Lending Policies.
14. Back-up Senior Member Service Representatives with opening new accounts, closing accounts, and servicing existing accounts. Setting up new account files and provide members with all necessary information for membership.
15. Community and volunteer involvement.
16. Answer the telephone in a courteous manner as needed.
17. Monitor branch operations to ensure a consistent, professional approach.
18. Responsible to keep your desk and equipment clean and neat.
19. Report problems or concerns to Member Service VP.
20. Perform other duties as required by the Member Service VP.

**Experience:**

- Two-year managerial experience or two years' member service representative experience
- Experience in lending
- Basic Microsoft office computer experience

**Skills:**

- Ability to be able to clearly communicate with staff and members through verbal or written correspondence
- Ability to empathize with members concerns while enforcing credit union policies uniformly
- Good Interpersonal skills/Phone skills
- Ability to Multitask
- Previous training experience
- Bilingual preferred but not required

**Education required:**

- High School diploma/equivalent

**Expectations:**

- Minimum of 4 hours a month of business development to including meeting such as; current and potential sponsor groups, merchants, Chamber/YCEA(York County Economic Alliance) events.
- Weekly hour expectations are from 40-43 hours.