

Title: Branch Manager I

Classification: Exempt

Reports to: Operations Manager, President/C.E.O.

Supervises: Member Service Rep., Loan Officer, Teller, Receptionist

General Summary

Guide and manage branch office in providing quality service to members in account transactions, loan applications, and new accounts. Solve problems within established policies and guidelines. Manage branch with less than ten employees.

Duties and Responsibilities:

Maintain a highly motivated, well-trained staff, maintaining effective employee relations.

Implement and monitor the budget for the branch.

Apply and evaluate policies and procedures for the branch. Ensure that the branch is in compliance with federal laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.

Evaluate the job performance of branch office staff to ensure quality of work and service to members.

Monitor branch activity, including number of transactions, volume, teller errors, loan volume, teller and loan personal sales, and new accounts.

Monitor key products and sales within branch to ensure profitable and sound business practices and a high quality of service for members.

Manage the security and safety of the branch. Analyze and monitor security and safety policies and procedures on an on-going basis.

Ensure that staff receives on-going training on security and robbery procedures.

Schedule adequate staff to ensure efficient branch operation.

Conduct loan interviews. Process, approve and/or close loans.

Monitor branch operations to ensure a consistent, professional approach.

Be a contact and maintain public relations with school board, parish schools and local businesses.

Assist staff or members in solving complex account problems.

Create and maintain a cross-selling environment within the branch.

Report branch income statements.

Job Specifications

Professional, well-developed interpersonal skills essential to deal courteously and effectively with a diverse group of callers and visitors.

Intermediate mathematical skills required (calculations and concepts involving decimals, percentages, fractions, etc.).

Work required frequent lifting of up to 20 pounds and occasional lifting of up to 35 pounds when carrying boxes and supplies to the stock room. This activity also requires occasional bending, squatting, twisting and reaching.

Disclaimer

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.