

**CAL STATE L.A. FEDERAL CREDIT UNION  
POSITION DESCRIPTION AND SPECIFICATIONS**

POSITION:	<b>BRANCH MANAGER</b>	EFFECTIVE DATE:	<b>01-2023</b>
REPORTS TO:	<b>VICE PRESIDENT MEMBER EXPERIENCE &amp; LENDING</b>	FLSA STATUS:	<b>Exempt</b>

**SUMMARY**

Cal State L.A. Federal Credit Union is looking for an enthusiastic Branch Manager. Under general direction, organizes, controls, and coordinates the activities of branch staff to ensure excellent member service.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Oversees branch staff in the efficient operation of all teller and new accounts activities to ensure that staff provide a high level of accurate, timely and personal service.
- Responsible for branch opening and closing procedures.
- Responsible for researching and proposing new and enhanced procedures, products, and services to senior management for the enhancement of member service. Must recognize inefficiencies and recommend solutions to streamline processes.
- Creates, tracks and reports progress on goals, projects, and procedures to advance sales and service goals.
- Ensures members receive excellent service.
- Works on the teller line and opens new accounts as needed.
- Ensures that MSR's are trained in all activities related to teller and new account operations.
- Establishes and maintains effective employee relations.
- Evaluates job performance of MSR's.
- Promptly directs complex questions or complaints to appropriate support staff for resolution.
- Participates in periodic staff meetings to discuss areas needing improvement, changes in procedures, new developments, or services, and to present general information.
- Ensures the safe and secure processing of cash and other negotiable instruments. Performs periodic surprise cash counts on MSR cash boxes and documents the results for review by the Credit Union's Supervisory Committee. Monitors and controls vault activity, daily balancing, ensuring proper levels of cash are available and a high level of security is maintained.
- Maintains knowledge of Credit Union policies and procedures that are applicable to MSR transactions and activities.
- Maintains up-to-date knowledge of regulations related to MSR transactions and activities.
- Maintains up-to-date and comprehensive knowledge of all credit union products and services.
- Works with management to ensure that safety and security policies are up to date and regular training is provided for safety and security.
- Serves as vault teller for the Credit Union, which includes ordering cash, verifying cash received, filling teller cash orders, maintaining vault security, and balancing vault cash daily. This responsibility can be delegated to an authorized Senior level authority.
- Investigates cash outages, institutes corrective flow of work and/or corrective disciplinary action where required.
- Oversees MSR work schedules to ensure adequate staffing.
- Encourages MSR development through personal example, coaching, communication, setting appropriate standards, motivation and holding employees accountable for performance.
- Supports the business development activities of the credit union; may include offsite interaction with members and/or potential members.
- Other duties as assigned.

## **PROFESSIONAL POSITION REQUIREMENTS**

This position requires the incumbent to:

- Maintain a positive and professional behavior and image with credit union members, staff, management, and board.
- Keep all credit union and member information confidential.
- Establish and maintain effective business relationships with staff in other departments.
- Maintain a professional appearance.
- Maintain a working knowledge of policies and procedures necessary to effectively perform job duties.

## **ENVIRONMENT/PHYSICAL ACTIVITY**

The environment for this position is an open office and is mostly clean and comfortable. It may include some minor annoyances such as noise, odors, drafts, etc. The incumbent is in a non-confined, office-type setting in which he/she is free to move about at will. Physical activity may include sitting, standing, driving, walking, carrying/lifting to 30 lbs., listening, speaking, and writing. Occasional travel may be required for seminars, meetings and to support business development activities.

## **MENTAL DEMANDS**

The incumbent in this position must be able to accommodate the following demands:

Time pressures and tight deadlines.

Long periods of exposure to complaints/problems of others.

Frequent interruptions.

## **EQUIPMENT OPERATION**

The incumbent of this job typically spends time operating equipment as follows:

Telephone and ancillary equipment.

Adding machine, calculator and/or other numeric keyboard equipment.

Standard computer with video display screen, keyboard, and mouse.

Multi-function or single function printers, copiers, fax machines.

Interactive data entry equipment such as on-line terminal, ATM, CRT, machine for debit card embossing.

## **POSITION REQUIREMENTS**

**These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this job. Individual abilities may result in some deviation from these guidelines.**

To perform effectively in this position, the incumbent must have:

- Three to five years management level experience in a financial institution
- Working knowledge of credit union operations including member services, teller activities, new accounts activities, vault, ATM operation, and security.
- Working knowledge of the laws governing credit union operations.
- Very effective verbal and written communications skills.
- Accurate, basic word processing/ten key skills.
- The skills and ability to manage the activities of others. These include a working knowledge of the management process which includes organization and scheduling, effective training, and development of employees, delegating, motivating, communicating, and enforcing performance standards and measuring results, taking corrective action and recommending employee rewards as appropriate.
- Excellent leadership and public relationship skills

- Valid California driver's license and satisfactory current driving record with DMV.
- Automobile insurance that includes minimum liability coverage as required by state law.
- Proficiency with Microsoft Word and Excel.
- Effective time management skills and the ability to meet deadlines and prioritize workload.
- Ability to write routine reports, standard operating procedures and business correspondence in English using proper grammar, punctuation, and spelling.
- Ability to pass a pre-employment background and credit check.
- Flexible schedule which may include Saturday hours, weekday evening hours and attending community events.
- Be willing to obtain notary license.

## **BENEFITS**

Medica, dental and vision. Retirement, life insurance, 11 paid holidays and accrued PTO.

Typically, these skills and experience are the result of several years of increasing responsibility in credit union operations with specific emphasis in teller and new accounts activities. This experience must have included supervisory responsibilities.

The incumbent must be able to perform this job safely, without endangering the health or safety of him/herself or others.