



TOPCU

Branch Manager - Position Description

POSITION SUMMARY

Using leadership and knowledge of TOPCU's policies and procedures, the Branch Manager will work to meet/exceed the department goals set by Management. This position requires the ability to drive sales to the branch through various means including networking. The Branch Manager will be responsible for the overall profitability of the branch whilst ensuring direct reports maintain a reputation for excellent service. Situations can move quickly from low stress to high stress and can require flexible hours. These work hours include weekends & holidays. This position meets the salary requirements stipulated by the DOL regarding the FLSA Administrative exempt requirements. Frequent travel between the East Broadway and Downtown Branches is required.

ESSENTIAL FUNCTIONS

- Monitor all activity within the branch and ensure compliance with credit union standards, policies, procedures and all governmental regulations
- Provide leadership and management to direct reports and allocate resources to meet operational needs for assigned branch/es
- Provide timely, accurate and complete reports to monitor assigned branch function and ensure steps are taken to correct unsatisfactory results
- Establish goals for team members, monitor and coach to these goals, create tracking mechanisms
- Lead departmental meetings as necessary to create consistency in employee knowledge and communication of business objectives
- Drive the branches to meet or exceed goals set by Management
- Build and maintain teamwork and communication channels
- Effectively evaluate the efficiency of the assigned branches and develop specific recommendations for improvements to staffing, facilities, products, pricing, policies and procedures
- Execute and resolve member and internal inquiries in a timely and professional manner
- Assist with special projects as assigned
- Actively participate in TOPCU business development and promotional events
- Recommend and assign relevant training for direct reports and actively pursue opportunities for personal growth
- Perform other duties as assigned
- Mandatory compliance of all BSA/AML regulations, forms and procedures:
 - Maintain awareness of and report suspicious activity
 - Complete annual BSA training
 - Notify immediate supervisor of any substantive discrepancies

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Our mission and values, and communicate it to internal and external members
- All types of commercial loans offered by TOPCU and thorough understanding of which ones will meet members' needs.
- In depth knowledge of TOPCU's policies and procedures.
- Credit union products and the organization
- All applicable state and federal regulations
Microsoft (Word, Excel, Power Point, Sharepoint), Windows and all programs/software applicable to department

Skills:

- Problem-solving analytical and mathematical
- Teamwork and leadership
- Written and verbal communication
- Active listening and comprehension

Ability to:

- Make product/service recommendations that meet member’s financial needs
- Lead a team environment to service members
- Mentor and coach team members
- Work in a fast-paced, highly motivated atmosphere
- Challenge the process, peers and those with a higher level of authority
- Use a computer and ten key adding machines
- Learn and utilize computer based operational systems applicable to department

MINIMUM EDUCATION, EXPERIENCE AND TRAINING

- Associates degree
- Two years sales experience
- Two years leadership/supervisory experience
- Two years’ experience in member-focused, fast-paced service-oriented environment
- Proven sales experience

OR

- Completion of a specialized course of study at a business or trade school
- Five years related experience
- Equivalent combination of education and work experience

PRE-EMPLOYMENT

Pre-employment Credit Check: Yes
 Pre-employment Bondability Check: Yes
 Pre-employment Drug Testing Required: Yes
 Pre-employment Background Required: Yes

Reports to:	COO	FLSA:	Salary – Exempt
Location:	Assigned Branch(es)	Status:	Full-Time
Reviewed:	11/02/18 MS	Created:	12/11
Supervisor:	Yes		

Physical Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Repetitive Motion	Repeating movements of arms, hands, wrists, fingers				X
Talk	Express or exchange ideas verbally				X
Hear	Perceive sound by ear				X
See	Obtain impressions through the eye				X
Kneel	Bend legs at knee, come to rest on knees			X	
Crouch/Squat	Bend body down and forward, bending legs and spine			X	
Crawl	Move on hands, knees, and feet	X			
Climb	Ascend/descend ladders, stairs, ramps	X			
Sit	Sit			X	
Stand	Stand			X	
Walk	Move about on foot; average distance per shift 3-5 miles		X		

Bend/Stoop	Bend downward and forward by bending spine at waist				X	
Lift	Raise or lower object > 10 lbs. from one level to another				X	
Lift	Raise or lower object > 25 lbs. from one level to another				X	
Carry	Transport an object					X
Push	Press with steady force, thrust objects forward, downward, outward		X			
Pull	Drag or tug objects		X			
Turn/Twist	Move a body part in circular motion				X	
Balance	Exceeding ordinary body equilibrium	X				
Reach	Extend hands and arms in any direction				X	
Handle	Seize, hold, turn with hands					X
Distinguish Color	Ability to distinguish color					X
Fingering	Picking, pinching, typing, or otherwise with fingers rather than whole hand					X
Grasping	Applying pressure to an object with the fingers and palm				X	
Feeling	Perceiving attributes of objects, such as size, shape, temperature, or texture				X	
Mental / Cognitive Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)	
Communication	Comprehend and use basic language, either written or spoken, to communicate information and ideas					X
	Comprehend and use technical or professional language, either written or spoken, to communicate complex ideas					X
Calculation	Perform numerical operations using basic counting, adding, subtracting, multiplying, or dividing					X
	Perform complex quantitative calculations or reasoning using algebra, geometry, statistics, or abstract symbols					X
Problem Solving	Formulate and apply appropriate course of action for routine or familiar situations			X		
	Use logic to define problem, collect information, establish facts, draw valid conclusions, interpret information and deal with abstract variables for unique or unfamiliar situations					X
Environmental Conditions	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)	
Weather And Temperature	Protection from weather conditions but not necessarily from temperature changes					X
	Subject to outside environmental conditions – no effective protection from weather	X				
	Activities occur inside and outside		X			
	Subject to extreme cold (typically below 32°)	X				
Atmospheric Conditions	Subject to extreme heat (typically above 100°)	X				
	One or more of the following conditions that affect the respiratory system of the skin: fumes, odors, dusts, mists, gases, or poor ventilation		X			
Noise	Worker is required to wear a respirator	X				
	Sufficient noise to cause the worker to shout in order to be heard above the ambient noise level	X				
Vibration	Exposure to oscillating movements of the extremities or whole body	X				
Hazards	Proximity to moving mechanical parts, moving vehicles, electrical current	X				
	Working on scaffolding and high places	X				
	Exposure to chemicals	X				
	Exposure to oils: air and/or skin exposure to oils and other cutting fluids	X				
	Worker is required to function in narrow aisles or passage ways	X				
	Worker is exposed to infectious diseases		X			
	Worker is required to function around prisoners or mental patients	X				

Physical Requirements Checklist



SEDENTARY

- Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body.
- Sitting most of the time.



LIGHT

- Exerting up to 20 pounds of force occasionally and/or a negligible amount of force constantly to move objects.
- Use of arm and/or leg controls requiring greater exertion of force than for sedentary work, and worker sits most of the time.

MEDIUM

- Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

HEAVY

- Exerting up to 100 pounds of force occasionally and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.

VERY HEAVY

- Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force constantly to move objects.

This position description is intended to indicate the basic nature of the position(s) allocated to this class and examples of typical duties that may be assigned. Any one position may not include all of the duties listed, nor do any listed examples include all tasks, which may be found in positions of this class. This position description does not constitute an employment agreement between the employer and employee and is subject to revision by the employer as the needs of the employer change and/or requirements of the job-related duties expand or are updated.