



POSITION TITLE		DIVISION
<b>AVP/Branch Manager – Pawtucket</b>		<b>Retail Banking</b>
REPORTS TO:	DEPARTMENT	DATE
<b>VP- Regional Manager</b>	Branch Location	<b>December 1, 2010</b>
SUPERVISES	FLSA	REVISED
<b>Tellers, Assistant Head Teller, Head Teller, Member Service Representatives, Assistant Branch Manager</b>	<b>Exempt</b>	February 2022

## GENERAL SUMMARY

Under general supervision, but following established policies and procedures, is responsible for providing leadership and direction to daily branch operations. Supervises and trains branch personnel in lending and deposit services. Ensures all branch personnel deliver exceptional customer service, aligned with the Credit Union’s core values and mission statement. Ensures that all branch personnel are working as a team and are providing efficient, effective and professional member service. Ensures branch is in compliance and is operating within Credit Union policies and procedures. Accountable for maximizing branch sales and minimizing operating losses. Responds to questions and/or provides information upon request from members (internal & external). Processes requests/transactions as appropriate. Assists members and potential members in understanding and utilizing Credit Union products and services. Fluency in Spanish is required.

## MAJOR RESPONSIBILITIES *(in descending order of importance)*

1. Ensures that the branch is open and ready to conduct business each business day.
  - a) Responsible for general maintenance, security and safety of the branch.
  - b) Oversees the ordering and verifying of currency shipments for the branch.
  - c) Ensures that the branch balances all transactions at the close of each business day. May assist tellers and others to resolve adjustments.
  - d) Authorizes adjustments. Maintains petty cash records. Audits safe deposit boxes.
  - e) Ensures all equipment is in proper working order. Oversees department data retention.
  - f) Promotes cross sales of the credit unions products and services.
2. Supervises and directs branch personnel to ensure a trained, motivated and professional staff capable of providing efficient and effective Branch and Member services to members. Interviews, recommends for hire, schedules, assigns work to, establishes performance expectations and recommends the necessary discipline and/or discharge of subordinate staff members, while maintaining required personnel documentation. Coaches and counsels staff on an on-going basis.
3. Coaches and develops staff in the area of sales. Plans and conducts weekly sales meetings. Maintains target cross-sell ratio. Creates, implements, and monitors branch sales campaigns.
4. Provides such member services as explaining savings and checking programs, opening new accounts, issuing traveler’s checks, IRA’s, certificates, approving checks and dealing with members with special concerns.
5. Researches and resolves member inquiries, explains specific policies and procedures. Assists branch personnel by answering questions and resolving more complex work-related problems. Proactively identifies potential members and works to retain existing members. Ensures that branch complies with member service standards.

6. Performs all duties of a Loan Officer. Takes loan applications, interviews member, provides disclosures, conducts credit checks, etc and ensures documentation is complete.
7. Maintains a positive working relationship with outside vendors to resolve problems and remains current on new product development. Keeps abreast of new rules and regulations that may impact Retail Banking Operations. Ensures that the branch is in compliance.
8. Participates in management meetings. Communicates information to subordinate staff. Participates in local civic and community organizations to seek new business opportunities.
9. Performs other managerial and/or branch related duties as assigned by the VP- Regional Branch Manager. Performs all duties of an Assistant Manager, Member Services Representative, Head Teller, Assistant Head Teller and/or Teller as needed.

**QUALIFICATIONS:**

*Education*

High school diploma or equivalent (GED) education required. BA/BS in Business, Finance or related field preferred. Equivalent experience may be substituted for a degree.

*Experience/Skills/Knowledge:*

1. Minimum 3 to 5 years progressively responsible experience in branch operations. Knowledge of teller, member service, and loan policies. Minimum two years previous supervisory experience.
2. Must possess excellent verbal, written, telephone and interpersonal communication skills.
3. Bilingual in English and Spanish – written and verbal fluency required.
4. PC proficient including Microsoft Office (Word, Excel, Outlook) and the Internet.
5. Ability to manage multiple projects/priorities simultaneously.
6. Ability to sell products and services and conduct business development calls on members and potential members.
7. Ability to function in a financial institution branch environment and utilize standard office equipment including but not limited to: PC, fax, copier, telephone, postage machine, etc. Travel required.

**GENERAL DESCRIPTION:**

*In terms of physical requirements, this position requires work best described as:*

- Sedentary     Light     Medium     Heavy     Very Heavy

**PHYSICAL TASKS:**

- Standing/Walking – Frequent
- Sitting-Continuous
- Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous
- Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous
- Reading – Ability to receive information through fax, e-mail. And text messages - Continuous

**AUDIO / VISUAL:**

- Requires vision to perform work dealing with data and figures and computer screens. -Continuous
- Requires ability to prepare and execute presentations, training programs and seminars.-Continuous

**PSYCHOLOGICAL/MENTAL DEMANDS:**

- Responds positively and productively to stressful internal (employee)/situations. - Continuous
- Assists others to work harmoniously and effectively as part of a work team. – Continuous

<b>Employee's Signature</b>	_____	<b>Date</b>	_____
<b>Manager's Signature</b>	_____	<b>Date</b>	_____
<b>Human Resources' Signature</b>	_____	<b>Date</b>	_____