

**City and County Credit Union  
Job Description**



**Job Title:** Branch Manager II  
**Department:** Administration  
**Reports To:** Vice President – Member Experience  
**FLSA Status:** Exempt  
**Prepared By:** Vice President - Administration  
**Prepared Date:** July 2014  
**Approved By:** Vice President - Administration  
**Approved Date:** July 2014

**Summary**

The Branch Manager II is accountable for delivering superior financial results and best in class member service adhering to CCCU Service Standards. The Branch Manager II is responsible for creating an engaging, proactive sales and service environment in which employees deliver high level member experience consistently. The role is responsible for maximizing employee productivity and effectiveness through leadership and coaching. The role is also accountable to risk and compliance management and optimal operation of the branch.

**Essential Duties and Responsibilities**

**Branch Sales Performance 40%**

- Responsible for monitoring and coaching to sales and service performance and results of assigned staff.
- Responsible for identifying areas of performance improvement in assigned staff and provides recommendations to the Vice President – Member Experience as to proposed solutions.
- Demonstrates strong knowledge of all deposit and lending products. Is knowledgeable about federal regulations governing the member service/loan areas and teller functions.
- Promotes a favorable image of the credit union and projects a professional cooperative attitude. Also, supports organizational values and objectives.
- Responsible for establishing and cultivating the Credit Union’s presence in the local community through community partnerships and for generating new business and referrals through proactive outbound calling and networking.
- Assists members when the need is apparent or assigned.

**Staff Leadership-Approximately 30%**

- Hires and assists in training new employees, ensuring that they fully understand credit union policies and procedures, their job related responsibilities and CCCU Service Standards.
- Responsible for facilitating a positive, motivating environment that fosters and encourages employee engagement to provide outstanding member service to meet and exceed sales goals.
- Grow capabilities of branch employees by providing coaching, guidance and by developing individual career and/or development plans for all direct reports.
- Responsible for building, coaching and sustaining a team of highly engaged employees who are capable of delivering sales and service, operational and risk management performance excellence in line with organizational values and objectives.
- Responsible for developing a staff of highly engaged employees as measured by the monthly

Quality Loop results.

- Prepares, conducts and documents performance reviews to communicate performance standards and expectations of team members to ensure accountability and effective performance.
- Identify and addresses performance issues in a timely manner, with a sense of urgency, to ensure all team members are performing at the highest level.
- Demonstrates discretion, diplomacy, tolerance and understanding when working with employees.

#### **Member Servicing-Approximately 10%**

- Provides quality, personalized relationship servicing to ensure member satisfaction, additional business generation and retention in line with organizational values and objectives.
- Resolves complaints in an appropriate and timely manner to ensure member needs are met or exceeded, escalating to a higher level as necessary
- May assist members with account maintenance, documentation, client correspondence, and paperwork as necessary.

#### **Employee Engagement-Approximately 5%**

- Conducts themselves in a manner that is in accordance with CCCU Service Standards.
- Actively works toward building an engaging work environment with all credit union employees.
- Proactively brings ideas to management on how to effectively build employee engagement within their department.

#### **Operational Duties-Approximately 5%**

- Oversees the flow of cash and financial instruments in accordance with policy. Also, oversees branch procedure, security and safety, loss prevention and loss recovery.
- Is an available and knowledgeable resource for the branch office staff in all areas of branch operations.
- Monitors branch employees' compliance with procedural changes and recommends corrective actions when necessary.
- Compiles and reports branch performance data as necessary.
- Complies with the provisions of the Bank Secrecy Act.

#### **Training-Approximately 5%**

- Participates in ongoing professional development, maintaining an advanced level of financial-services knowledge through in-house and external training. I.e. Products, technology, business development and networking.

#### **Other-Approximately 5%**

- Performs all other reasonable related business duties as requested.

#### **Performance Measures:**

- Meets all sales and referral goals as determined annually.
- Adheres to documentation and compliance of policies and procedures.
- Displays strong negotiation skills and good business judgment to escalate situations to management when appropriate.
- Satisfactory completion of product and service training.

- Satisfactory Quality Loop monthly survey results.
- Efficient in time management.

### **Supervisory Responsibilities**

Directly supervises five or more non-supervisory and potentially one or more supervisory employees. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and/or Experience**

Bachelor's degree (B.A.) from a four-year college or university in finance or business related field and five years financial institution experience; or equivalent combination of education and experience in deposits, lending and teller functions. Also, five years of supervisory experience.

### **Language Skills**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, members, and the general public.

### **Mathematical Skills**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rates, ratios and percentages and to draw and interpret bar graphs.

### **Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

### **Computer Skills**

To perform this job successfully, an individual should have knowledge of Microsoft Excel Spreadsheet software and Microsoft Word Processing software.

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit; use hands to finger, handle, or feel; and reach with hands and arms; and talk or hear. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be

made to enable individuals with disabilities to perform the essential functions.

While performing the above duties, the employee is in a pleasant, air conditioned office environment. The noise level in the work environment is usually moderate.