

EXTRA Credit Union
Structured Compensation - Job Description
Branch Manager Washington

Data Year: 2023

Prepared On: 12/19/2022

Department:	None	Grade:	11
Reports To:	AVP, Member Services	Classification:	Exempt
Supervises Direct:	6	Supervises Indirect:	0
Approved By:	JM/ JC	Effective Date:	01/01/2011
		Revised Date:	12/19/2022

Role:

To direct the operations of Extra Credit Union's New Washington location, ensuring that the Branch meets organizational, lending, financial and service goals. To Increase membership. A very strong knowledge of lending, customer service, and cultivating relationships in the community. Meet established Branch and individual goals.

Essential Functions & Responsibilities:

- E 25% Directs, develops, motivates, hires and disciplines branch personnel; administers performance evaluations and recommends appropriate personnel actions.
- E 15% Create, cultivate, and deepen strategic relationships within the community. Represent the Credit Union through participation in community events and networking.
- E 15% Monitors branch operating results relative to established objectives and insures that appropriate steps are taken to correct unsatisfactory conditions.
- E 10% Maintains communications with main office; prepares and submits standard reports; attends scheduled management meetings.
- E 10% Represents the branch as appropriate in its relationships with members, sponsor organizations(s), suppliers, other financial institutions, and similar groups.
- E 10% Monitors all branch activities to insure they are in compliance with established credit union policies and procedures.
- E 10% Provide service and sales support, training, coaching, recognition and subordinate development to all staff.
- E 5% Performs other related duties as assigned.

Performance Measurements:

1. Maintain a cohesive, highly trained, motivated staff sufficient to meet daily branch demands.
2. Provide informed, professional and accurate service and support to all members and associates.
3. Maintain or exceed annual budgeted department operating and growth plan while maintaining or improving the financial stability of the department.
4. Develop and maintain business partner relationships with the community and area schools by calling on potential SEG's and coordinating branch participation in community activities.

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5. Effectively evaluate the efficiency of the branch and develop specific recommendations for improvements to personnel, facilities, products, pricing, policies, and processes.
6. Meet or exceed the established branch goals each month at a minimum of 95% and ensure direct reports achieve 95% of their individual goals.
7. Promote a sales culture within the branch by example. Coach all employees at least monthly and develop employees to identify cross sales opportunities.
8. Adheres to the credit unions sales and service standards.
9. Note observations of employee performance. Give and receive feedback from employee on the same no later than 30 working days following each month, completing performance reviews within the prescribed timeframe.
10. Passes the Product and Service Knowledge Assessment on an annual basis with a passing score.

Knowledge and Skills:

Experience	Three years to five years of similar or related experience.
Education	(1) A two-year college degree, or (2) completion of a specialized certification or licensing, or (3) completion of specialized training courses conducted by vendors, or (4) job-specific skills acquired through an apprenticeship program.
Interpersonal Skills	Motivating or influencing others is a material part of the job. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others. The role requires a significant level of trust or diplomacy.
Other Skills	Ability to manage and direct the activities of all branch personnel.
Physical Requirements	This job requires using hands and fingers to keyboard for data entry into a computer, which may include repetitive motions. Ordinary visual acuity is needed to prepare and revise documents. Average hearing ability is necessary to receive detailed information verbally. This job is mainly sedentary and may require the candidate to exert up to 40 lbs. of force occasionally.
Work Environment	No hazardous or significantly unpleasant conditions exist, such as in a typical office.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

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Printed Employee Name

Date

Employee Signature