



## **Manager, Branch Operations**

Supervised by: **General Manager**

Revised date: May 2018

## **Job Description**

The Manager, Branch Operations is a member of the executive team, reporting to the General Manager. She participates in the development of the credit union's strategies and policies. Within branch operations, she ensures a high level of member service. She contributes to the design and development of policies/programs/systems.

The Manager, Branch Operations has responsibility for providing overall direction and coordination of all retail operations, including sales and service, within Credit Union policies; deposit-taking, registered products, personal lending and residential mortgages. She also acts as the privacy officer, security officer and CAMLO. She works with the General Manager to plan and implement an overall banking business strategy including business case development as appropriate.

The Manager, Branch Operations also provides leadership to the staff to ensure the effective utilization of human resources and to promote motivation, enthusiasm, professionalism and service excellence.

### Staffing:

Manages and provides leadership to the staff to ensure the effective utilization of human resources and to promote motivation, enthusiasm and professionalism by:

- ❑ As part of a management team, recruiting and selecting staff members, conducting interviews and making the hiring decision for front-line staff and participating in the hiring decision for other staff.
- ❑ Identifying learning needs and career goals of staff, assisting with the development of employee career paths, initiating cross training opportunities and ensuring that skills are maintained and upgraded as technology and systems change.
- ❑ Conducting formal performance appraisals at three months and one year for new employees and continuous performance feedback for other team members. Ensures that job descriptions are current.
- ❑ Identifying promotional opportunities, in consultation with the management team.
- ❑ Identifying performance problems and initiating corrective action where performance deviates from established standards including developing and implementing a plan for improvement; initiating or consulting on progressive disciplinary matters where indicated, including issuing verbal and written warnings and recommending termination, in consultation with the management team.

- ❑ Providing technical advice and direction on all problems referred by staff members.
- ❑ Scheduling staff shifts and vacations.
- ❑ With the General Manager, participates in Collective Agreement negotiations.

#### Management:

Manages and directs the administration and coordination of retail branch operations ensuring service excellence by:

- ❑ Resolving complex operational problems and significant member complaints referred by subordinates.
- ❑ Acting as advisor to the General Manager in all areas of administration, management and operational concerns.
- ❑ Keeping the General Manager up-to-date on member complaints and effectiveness of programs through regular meetings and briefings.
- ❑ Identifying the need for new and revised policies, procedures and systems, and making related recommendations to the General Manager.
- ❑ Maintaining up-to-date knowledge in the field of relationship banking and management processes through attendance at conferences and workshops.

#### Reporting and Audit:

- ❑ Assists internal and external auditors.

#### Systems & Procedures:

- ❑ Acts as Privacy Officer, ensuring adherence of branch staff to privacy law and credit union policies.
- ❑ Acts as Security Officer.
- ❑ Acts as Anti-Money Laundering Officer.
- ❑ Corrects any problems related to the processing of information, statements and reports when requested.
- ❑ Reviews and evaluates overall retail lending and deposit procedures and systems to identify strengths and weaknesses; develops, recommends and implements new procedures to improve efficiency; discusses the potential for new or revised systems, products, services and policies affecting credit union operation with the management team.
- ❑ Monitors the implementation and status of office procedures by providing guidance and training to staff.
- ❑ Establishes effective workflow and communicates these clearly to staff.

#### Payroll:

- ❑ Maintaining liaison with the benefits plan through Central 1.

#### Marketing & Service:

- ❑ Representing the credit union by participating in community events as required.
- ❑ Contributing to the growth of the Credit Union by engaging in and encouraging staff in the promotion and sale of Credit Union services.
- ❑ Authorizing transactions over teller/clerk limits.
- ❑ Monitoring service delivery and ensuring all member concerns and issues are resolved in a timely and effective manner by staff.
- ❑ Processing residential mortgages applications

- ❑ Managing the registered products and mutual fund sales for the branch, handling complex transactions as well as administration.

Planning:

Participates as an active member of the Management team by:

- ❑ Attending regular team meetings to exchange information on department activities, discuss short and long term goals, identify and resolve operational issues and problems using a collaborative approach and ensure the continuing effectiveness of the team.
- ❑ Participating as a member of the management team in the strategic planning process for the Credit Union.
- ❑ Contributing to the design and development of policies, programs and budgets to meet those goals.
- ❑ Ensuring the even flow of communication concerning overall plans and programs to all levels of branch staff is maintained.
- ❑ Acting as an advisor to management in all issues relating to banking.
- ❑ Acting as a resource to board committees as designated.

Delinquency:

- ❑ Oversees the overall administration of the loan payments to ensure timely collection of overdue retail loans, mortgages, lines of credit and overdrafts.

**QUALIFICATIONS**

It is expected that the candidate will have 10 years related banking experience with hands on knowledge of most of the services and functions within the branch. The candidate will have proven skills in communications, member transaction processing, lending, banking systems usage, HR management, change management, office systems, and managing relationships with back-office service providers.