



JOB DESCRIPTION
Manager, Member Services (III)

Department	Member Services Branch
Reports to	Assistant Vice President, Member Services Branch and receives direction from Senior Vice President/Chief Member Experience Officer
Supervises	Member Services Staff

Job Summary

Following established procedures, directs, organizes and controls the operational activities and staff of a Member Services Branch; usually less than 12 employees and/or more than one Member Services Branch with high operational and transaction volume. May manage an office with extended hours including evenings and weekends. Typically reviews and approves consumer and possibly real estate loan applications. Responsible for implementing credit union policies and procedures in relation to member service and loan transactions. Coordinates member services and activities; represents the credit union at community organizations and events.

Essential Functions

- Following established procedures, directs, controls, and manages the daily operations of the Member Services Branch; including budget, staffing, inventory, security, building maintenance and overall member service.
- Actively practices the behaviors required by the credit union’s guidelines for Member Service in all transactions with members and staff.
- Responsible for establishing and maintaining excellent member relations by providing services and cross-serving credit union products.
- Has a thorough working knowledge of the functions of a Member Services Supervisor.
- Responsible for hiring, training, development, performance evaluations, coaching, and discipline of employees.
- Responsible for the tracking and achievement of Member Services Branch goals.
- Performs, monitors and upholds established procedures outlined in the Operations Manual, the Member Needs and Products Guide, the Consumer Loan Manual, the Security Manual, the Injury and Illness Prevention Program and related materials.
- Responsible for Member Services Branch business development.

- Represents the credit union at community functions and events.
- Prepares and analyzes reports as directed.
- Ensures established safety and security procedures are followed at all times.
- Builds a harmonious work atmosphere for employees and members.
- Performs other duties as assigned.

Required Knowledge, Skills, and Abilities

- Must possess excellent member service skills, strong operational and lending skills and have the ability to supervise and train staff.
- Computer literacy, excellent oral and written communication skills, and the ability to effectively work with staff.
- Mental acuity necessary to understand and abide by rules of confidentiality.
- Ability to understand and respond to complex verbal and written communications.
- Ability to count, disburse, reconcile and balance financial instruments.
- Ability to effectively communicate in person, by phone and in writing.
- Ability to read and accurately interpret written and numerical data.
- Manual dexterity to accurately enter and record data using a keyboard, computer terminal and other office equipment.

Education and Experience

- College degree in business administration or related field preferred.
- Combination of experience and additional industry-related training may be substituted for college degree.
- Must maintain California Notary designation.
- Six years of demonstrated management experience with a credit union or other financial institution preferred with proven knowledge of operations, lending, business development and supervision; or similar experience.

Additional Requirements

- Incumbent must be bondable and possess a valid driver's license.

Physical Demands

This is a moderately sedentary office classification although standing and walking between work areas is required. Individual(s) in this class must possess the mobility to work in a standard office setting and use standard office equipment, including a computer; visual acuity to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator at a reasonable speed, and to operate standard office equipment. Person(s) in this classification occasionally bends, stoops, kneels, reaches, climbs, and walks; and pushes and pulls drawers open and closed to retrieve and file information. Employee must possess the ability to lift, carry, push, and pull materials and objects weighing up to 10 pounds regularly, and up to 50 pounds occasionally. Works in an office environment with moderate noise levels.