

Belonging Never Felt Better



Non-Exempt
Grade: 11

TITLE: **Member Services Supervisor**

REPORTS TO: Manager, Member Services and receives direction from the Sr. AVP and VP, Member Services.

SUPERVISES: Provides working leadership to Member Services staff.

SUMMARY: Under general supervision, upholds the standards of quality service in all member transactions. Trains new employees and provides working leadership and guidance to Member Services staff. Performs a wide variety of complex duties relating to the handling and processing of members' transactions. Handles and adjusts member complaints, transactions, and errors.

ESSENTIAL FUNCTIONS:

- Oversee the daily operations of the Member Services Branch and staff ensuring that adequate coverage is present at all times; schedule work hours, breaks, and lunches.
- Manage multiple office workflows in ONBASE.
- Assist in the hiring, training, performance evaluations, coaching, and discipline of employees.
- Assist with informational staff meetings as required.
- Perform Member Services duties when required and is able to perform all the functions of a Member Services Representative (I), Member Services Representative (II), and Sr. Member Services Representative:
 - *With tact and professionalism, handle and adjust member complaints. Resolve problems, answer questions.*
 - *Assist with beginning and end-of-day reports and procedures. May open or close office as required.*

- *Establish and process new member accounts, prepare required paperwork, and perform other new accounts duties as required.*
- *Assist in safe deposit accounts, open and close safe deposit boxes, where applicable.*
- *Admit, with proper identification, access to safe deposit boxes.*
- *In a courteous, professional manner, assist members with financial transactions.*
- *Review and approve exceptions to members' accounts.*
 - *Disburse funds by cash, check, or transfer. Accept deposits or payments and enter each transaction into the credit union's data processing system.*
 - *Sell negotiable items such as cashier's checks, wire transfers, pre-paid cards etc.*
 - *Accept and process financial service request forms to include automatic transfers, check reorders, etc.*
 - *Accurately balance cash, cash items, and general ledger entries at the end of each business day.*
 - *Review out of balance conditions at closing and reconcile cash drawers, as required.*
 - *Under dual control, process and document ATM deposits, merchant bags, and night depository.*
 - *Settle and service ATMs, and prepare cassettes.*
 - *Follow, and ensure staff follow, security procedures for member services area, including cash drawer limits and robbery procedures.*
 - *Is familiar with credit union policies, products, and services and is able to answer member questions and make referrals, as needed.*
 - *Has thorough knowledge of the financial services offered by the credit union and cross-services companion products/services as needed.*
 - *Maintain accurate files on member accounts and/or loan files as required.*
- *Ensure that the safe and/or vault is secure at closing time and alarms are properly set.*

- Supervise all processing of daily transactions, including cash, checks, drafts, vouchers, and cash receipts.
- Proof Member Services staff work, determine that all cash setups and the vault are in balance each night and that cash is properly secured at all times.
- Solicit new business and cross-service the benefits and services of the credit union.
- May be responsible for office cash orders and ensuring that cash limits are maintained at appropriate levels.
- Perform monthly audits, prepare and receive cash, and perform other support activities.
- Is responsible for inventory control and replenishment of supplies.
- Must work harmoniously with other employees.
- Perform other duties as assigned.

PRINCIPAL RESPONSIBILITIES:

- Actively practice the behaviors required by the credit union's guidelines for Quality Service in all interactions with members and staff.
- Maintain excellent member relations, provide services, and cross-services credit union products.
- Preserve member confidentiality.
- Understand and respond to complex verbal and written communications.
- Count and disburse bills, change, etc.
- With accuracy, enter data using the keyboard and computer terminal to record member transactions.
- Read signatures, signature cards, checks, vouchers, deposit slips, manuals, etc.
- Use a 10-key adding machine daily and operate a variety of office equipment.
- Reconcile and balance financial instruments.
- Work effectively with staff, management, support personnel, and members.

- Lift, carry, and store change and supplies weighing up to 50 lbs.
- Load, unload, and repair machinery requiring fine motor and physical dexterity.
- Must be able to remain seated for prolonged periods of time. May be required to remain standing for prolonged periods of time.

REQUIRED KNOWLEDGE:

This position requires knowledge and experience in Member Services, including the ability to assign work, schedule, coordinate, and provide technical guidance to Member Services staff and review progress. Must be able to work tactfully and professionally with members to solve problems and handle complaints. Incumbent must be bondable.

EXPERIENCE:

This is an entry level supervisory position requiring two or more years of Member Services Representative experience. At least one year with Coast Central Credit Union is preferred. Must be knowledgeable in credit union policies, procedures, and philosophy, and have demonstrated the ability to oversee and train staff.

EDUCATION:

High school graduate or equivalent.