JOB DESCRIPTION

POSITION: VP Branch Manager
REPORTS TO: VP Branch Regional Manager
SUPERVISES: Refer to company intranet

COLUMBIA CREDIT UNION'S LEADERSHIP PHILOSOPHY

Leaders at Columbia CU inspire enthusiasm and accountability that drive our mission. Leaders build engagement and communicate honestly and openly. By rallying everyone around our shared vision, Leaders model and expect the best from individuals and teams.

JOB SUMMARY

This position is responsible for ensuring that a Level Three Branch meets and/or exceeds its goals for production, sales and service, and member-market growth. Promotes Columbia Credit Union's sales through service initiative and effective sales management. Develops and implements plan for staff development and leadership development. Ensures compliance with regulations and policies. Conduit for critical information between upper management, staff, and other departments within the company. Assists in advancing the strategic direction of the Credit Union.

ORGANIZATIONAL COMPETENCIES

- **Instills Trust**
  Gaining the confidence and trust of others through honesty, integrity, and authenticity.

JOB SPECIFIC COMPETENCIES

- **Builds Effective Teams**
  Building strong-identity teams that apply their diverse skills and perspectives to achieve common goals.
- **Communicates Effectively**
  Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.
- **Courage**
  Stepping up to address difficult issues, saying what needs to be said.
- **Customer Focus**
  Building strong customer relationships and delivering customer-centric solutions.
- **Drives Engagement**
  Creating a climate where people are motivated to do their best to help the organization achieve its objectives.
- **Drives Results**
  Consistently achieving results, even under tough circumstances.
- **Ensures Accountability**
  Holding self and others accountable to meet commitments.
- **Manages Ambiguity**
  Operating effectively, even when things are not certain or the way forward is not clear.

- **Resourcefulness**
  Securing and deploying resources effectively and efficiently.

ESSENTIAL DUTIES

- Monitor key products and sales within branch to ensure profitable and sound business practices and a high quality of service for members.
- Promote and support cross-selling environment within the branch. Train employees to maximize opportunities to offer products.
- Responsible for performance, growth, and regulatory issues for a significant area of branch operations.
- Process all member transactions and requests (including but not limited to; operation of computers, maintaining coin machine and ATM, servicing Drive-up Window, Vault activity etc.)
- Open new accounts, process and book loans, and/or operate a teller window when necessary.
- Performs Signature Guarantee as needed.
- Seek opportunities to represent Columbia through volunteerism and community involvement.
- Serve in greeter position, when necessary, to assist members entering the branch by assessing their needs and serving them accordingly.
- Mentor Service Manager.
- (II) May mentor the work of a Level I Branch Manager.
- (III) May oversee the work of Level I and II Branch Managers as assigned by Senior Management.
- (III) Serves as a mentor for Level I and II Branch Managers.
- Comply with internal controls and with state and federal laws.
- Ensure compliance with internal controls and with state and federal laws, including Currency Transaction Reporting and Columbia's Bank Secrecy Act compliance program.
- Hire for vacancies, ensuring that the branch is adequately staffed with competent employees.
- Maintain effective employee relations through a highly motivated and well-trained staff.
- Oversee adequate staffing to ensure efficient branch operation.
- Actively call on existing and prospective members, exploring needs and cross-selling products and services.
- Evaluate the job performance of branch staff to ensure quality of work and service to members.
- Monitor branch productivity including transaction and loan volume, sales, new accounts, etc.
- Coordinate with other departments, i.e. Business Banking and Business Development, to achieve sales and member growth goals.
- Manage the security and safety of the branch. Ensure that staff receives on-going training on security and robbery procedures.
- Participates in special projects as assigned.
- Recommend, implement, and supervise the branch budget.
- Research branch market area to create and implement effective sales techniques which will generate additional new accounts, new deposits, and new loans.
- Participates in continuing education/training.

JOB REQUIREMENTS

- Branch Manager I: Minimum six (6) years' financial institutions experience;
  - Minimum one (1) year supervisory experience is preferred.
- Branch Manager II: Minimum six (6) years of banking/credit union experience;
  - Minimum two (2) years' Branch/ Service Management experience.
- Branch Manager III: Minimum eight (8) years of FI management experience.
  - A bachelor's degree or related experience.
- Demonstrated ability in managing in a "sales through service" environment.
- Demonstrated skills in coaching staff and communicating with all levels in an organization.
- In-depth knowledge of products and services.
- Maintains Notary and CL/CD licenses
- Proficient in using Word and Excel.
- Required current NMLS license or ability to obtain upon hire.
- Requires Lending experience
- Thorough knowledge of all federal and state laws and regulations pertaining to financial operations and personnel.

PHYSICAL JOB REQUIREMENTS

The physical requirements outlined below encompass the diverse range of abilities needed for individuals to effectively perform the essential functions of this job.

- Communicate information and ideas clearly for mutual understanding.
- Exchange accurate information effectively in various situations.
- Observe details at close range (within a few feet of the observer).
- **Frequently** remain in a stationary position.
- **Occasionally** move around the workspace.
- **Constantly** operate a computer and other office productivity machinery.
- **Rarely** ascend/descend a ladder.
- **Occasionally** position oneself to maintain files or other items.
- **Rarely** move items weighing up to 60 pounds across the office for various needs.
- **Occasionally** work in outdoor weather conditions.
- **Never** operate a vehicle.
- **Occasionally** travel between worksites.