

## **Alamo FCU**

### **Employee Role Expectations and Accountability**

**Role:** Branch Manager

**General Description:** The Branch Manager is responsible for managing the Alamo FCU Branches and Call Center staff while managing the productivity generated from these departments. Monitors, analyzes and reports key performance metrics and maintains service levels to ensure superior member service.

The Branch Manager is responsible for the overall branch performance, execution of the service strategy and operations that are aligned with the strategic direction and long term success factors of the Credit Union. Manages the branch operations staff, assumes administrative responsibility for the daily activities, address policy or procedures violations and ensures members are promptly and professionally served.

#### **Specific Accountabilities:**

- Works closely with the Chief Operating Officer to improve the overall quality of member experience at Alamo FCU.
- Works hand in hand with the Operations Specialist to ensure compliance and the quality of the member experience.
- Take full ownership for leading, motivating and managing a team of professionals in the execution of technical/non-technical internal member support activities.
- Manages the branch staff and call center staff to ensure achievement of goals, including, but not limited to, desired levels of product and services volume, mix, branch profitability, segment growth, and market share.
- Responsible for the goals stated for the business; allocating and coaching staff to achieve stated goals.
- Lead sales and service activities within the branch by planning seminars/workshops, micro-marketing events, promotional campaigns, product initiatives, etc.
- Track trends and report any procedural gaps or potential operations losses.
- Assist with audits and in preparing month-end and year-end reporting.
- Provides data tracking and reporting to Senior Management.
- Assist and leads special projects assigned by the Chief Operating Officer.
- Participates in community affairs to increase the Credit Union's visibility and to enhance new and existing member opportunities.
- Ensures transactions and services comply with the credit unions policies and regulatory requirements.

#### **Role Relationships**

- Manager: Chief Operating Officer
  - The relationship the role has with the manager represents the reason the role was created. The manager designs the work as it has been designed in this “Employee Accountability Form”. The manager assigns very specific tasks that the employee

has the authority to do and holds them accountable to do it. The manager assigns the tasks needed for the organization to arrive at its goals.

- Immediate Subordinates: Member Service Consultants
  - The immediate subordinate roles allow for the assignment of duties more effectively handled at another level and the assignment of necessary and specific accountabilities and authorities.
- Information Provider: Director of Finance, Director of Lending, President and External Vendors
  - This relationship requires the role to respond to the stated information needs of another, though in a manner and timing of choice. It also requires the role to actively and voluntarily provide information that may affect the work accountabilities of others.

### **Work Complexity**

The work complexity requires the role to overcome immediate obstacles by direct action as they are encountered and must be able to accumulate and consciously sort such data to diagnose problems and initiate actions to prevent or overcome the problems identified.

This level of work requires the role to work in the following manner for each key accountability:

1. Leadership: Lead direct reports through a process and provide assistance and development when needed.
2. Customers (internal/external): Maintain contact with current or new internal and external customer/suppliers to identify 3 months to 1 year trends in their needs for your services.
3. Decision Making: Make resource allocation decisions within specified limits and recommend decisions when out of limits.
4. Innovation: Conceptualize and implement new cross-functional processes which prescribe the way future work is to be carried out over the next 3 months - 1 year and provide feedback to manager to assist in new process/process enhancements.
5. Planning: Develop 3 months – 1 year plans with goals, resource requirements, actions, and milestones.
6. Resource Management: Manage within operating budget and identify alternatives to re-design and optimize the mix of key inputs (process design, technology, people) to achieve 3 months – 1 year goals.
7. Results: Concurrently manage day-to-day operational and financial goal attainment while ensuring that 3 month – 1 year organizational goals are achieved.

**Authorities:** These are the aspects of the role that allow a manager to effectively manage personnel.

- Veto on new appointment: While a manager does not have absolute freedom in making a new appointment to a vacant position, the manager does have the authority to reject any candidate whom he/she judges not to be capable of doing the work required. Final selections for vacant positions should be made with the concurrence of the Manager-Once-Removed in order to ensure succession planning needs are being met.
- Task Assignment: The Manager has the authority to assign relevant tasks to subordinates to accomplish given accountabilities.

- Personal Effectiveness Appraisal: The manager has the authority to independently appraise the effectiveness of his/her subordinates. As part of this authority, the manager must maintain regular annual appraisals and coaching as part of the responsibility of having this authority.
- Initiate Removal from Position: If, after fair warning and coaching, the manager decides that a subordinate can no longer do the work required to be done, then the manager has the authority to determine that the subordinate will no longer work for him/her. The manager does not have the authority to terminate the subordinate's employment from the organization (other than for gross violation of corporate policy or organizational values), since the subordinate might be competent to work in some other area of the organization.
- Financial Expenditures: The Branch Manager has the authority to decide the amount and timing of expenditures planned for within the approved operating budget of his/her area of authority to a maximum of \$500 for any single item. The manager should make recommendations to the Chief Operating Officer for any expenditure over that amount.

The Branch Manager will have the following experience and attributes:

- Bachelor's degree required or equivalent experience.
- Experience in cash handling and branch operations.
- Experience managing operations staff and vendor relations.
- Experience communicating and presenting to Executive level leaders.
- Experience building a department and creating effective internal controls.
- Excellent written and oral communication skills.
- Demonstrated leadership ability, team management, and interpersonal skills.
- Excellent analytical and abstract reasoning skills, plus excellent organization skills.

### **Additional Information**

Type: Exempt

Functions: Operations