



## JOB DESCRIPTION

**Position Title:** Branch Manager  
**Location:** Macedon, NY

### General Summary:

Responsible for organizing, planning, and directing the functions of a full service branch office. Ensures that member sales and service functions are provided that are consistent with Reliant's Corporate Culture Statements and practices. Ensures that established policies and procedures are followed. Actively promotes and participates in the Sales and Service Process with members and staff.

Has primary responsibility and is accountable for achieving Branch Office sales and service goals mutually established with senior management.

Provides leadership to branch office staff. Fosters the team building and working relationship process among staff by means of coaching, mentoring, and training sessions.

Makes business calls to prospective and existing member-employee groups. Represents the Credit Union at designated civic, service, and other meeting functions within the community.

Understands and follows expectations of Reliant's corporate culture. Leads by example in the consistent demonstration of accountability, respect, and teamwork. Provides quality service and strives to exceed service expectations. Acts in professional, friendly manner at all times. Completes work timely and accurately.

### Duties & Responsibilities:

*The following duties and responsibilities for this position are not all inclusive; others may be required or assigned.*

1. Maintains and manages Reliant's Corporate Culture Statements in a branch office environment.
2. Assures that a full range of products and services are provided to the members within the context of Reliant's Corporate Culture.
3. Assists with the resolution of loan delinquency problems and asset recovery matters by making contact with members when appropriate.
4. Serves as fiscal agent for the Credit Union. Has primary fiduciary responsibilities for branch office security and safety. Responsible and accountable for safe-guarding of the branch office assets. Enforces established compliance measures against internal and external fraud. Ensures that there is adherence to branch office security procedures.
5. Applies state and federal laws and regulations which are related to daily activities and branch office matters.
6. Ensures that the branch office is open and ready to conduct business each business day.
7. Handles difficult and/or sensitive member concerns as a priority item to assure a timely and fair resolution. Handles member service or operational issues with a sense of urgency for resolution.
8. Assists in annual planning and reviews of Branch Office deposit, loan and other sales and performance goals; financial goals which include non-interest income goals and expense controls; administrative and operational

goals. Has primary responsibility for implementation, monitoring and adhering to these goals at the branch office level.

9. a. Assigns work to staff. Prepares work-time schedule for staff.  
b. Provides leadership to branch office staff. Assumes a team leadership role. Understands and implements the concept of team working relationships among staff. Develops staff to work as a team.  
c. Coaches and trains branch staff to develop an adequate level of product knowledge, selling, service, and interpersonal skills.  
d. Conducts regularly scheduled meetings with branch office staff to keep them informed, discuss matters of common interest or concern, and to resolve problems.  
e. Prepares and conducts job performance evaluations with branch office staff. Has primary responsibility to develop Growth, Performance and Professional Improvement Plans with Staff.  
f. Trains and delegates various operational responsibilities to other branch office staff retaining accountability for the effective and efficient operation of the branch. Is responsible for the training and cross-training of branch office staff to assume necessary responsibilities for operations in the absence of the branch manager.
10. a. Ensures that the branch office balances all transactions at the close of the business day. Assists to resolve staff out-of-balance problems. Authorizes over/short adjustments. Schedules and conducts "surprise audits" as necessary to verify the accuracy of vault cash, teller balances, etc. Makes collection on bad checks received at the branch, overdrafts from ATM transactions, etc.  
b. Responsible and accountable for accurately maintaining all branch office records and providing required reports in a complete and timely manner.
11. Ensures that the Automated Teller Machines are serviced, operational and balanced each day. Serves as a member of the ATM Service Team.
12. Responsible for the general maintenance of the branch office and equipment. Has operational knowledge of equipment and is able to identify and diagnose equipment problems in order to make service calls for repair, etc.
13. Introduces Reliant services to members and prospective members outside of the Credit Union offices in scheduled and unscheduled meetings.
14. Consistently applies Credit Union policies, practices, and procedures. Understands and utilizes the freedom and authorization to act within established guidelines.
15. Advises and informs senior management on issues related to the general well-being of the Branch Office and the Credit Union. Accepts special project assignments made by senior management.
16. Attends scheduled meetings and training sessions.
17. Assists other staff members with the familiarization of Credit Union services, routines and operations when requested.
18. Provides feedback to marketing on sales and service promotions, product information, development, etc.
19. Develops sound and compatible working relationships with staff at all levels within the organization.

### **Required Knowledge, Skills and Abilities:**

1. Demonstrates leadership and ability to motivate staff reporting to this position. Is able to lead by example and set standards for staff.
2. Accepts new technology, methods, and procedures, open to change, can handle and accommodate new and changing responsibilities, is flexible.
3. Accepts and believes in the organization's Mission and Corporate Culture Statements, the purposes, goals and objectives of the Credit Union. Demonstrates loyalty to the organization.
4. Possesses:
  - a. A level of maturity and self-esteem.
  - b. A high degree of social skills.
  - c. Inner drive to perform a good job for personal fulfillment.
  - d. A high level of tolerance for member contact.

5. Perceives and reacts to the needs of others.
6. Enjoys working with members. Has a high desire to work with and meet the needs of members. Likes to sell.
7. Demonstrates a genuine interest in members, staff, and the organization.
8. Has the ability to learn and understand from experiences.
9. Is goal oriented, self-disciplining, industrious, and inspiring.
10. Branch office operational skills: a thorough and functional knowledge of branch office operations in order to coordinate the daily functioning of the branch and to resolve member and employee problems.
11. Management skills: Possesses the recognized managerial skills of the planning, organizing, staffing, directing, and controlling.
12. Conceptual skills: Ability to understand how one's own area of responsibility relates to the total operations of the organization. Has the ability to diagnose, assess and discuss management problems.
13. Interpersonal skills: Adapts to the different behavioral tendencies of members. Perceives and reacts to the needs of others, meets others easily, a good listener, confident, sincere, and open-minded.
14. Sales strategy skills: Actively considers and makes plans for the branch office sales strategy approaches which comes from an understanding of member needs and demographics particular to the branch office location. Knows and understands the competitive marketplace.
15. Product knowledge: Complete familiarity with all of the Credit Union's deposit, savings, and loan programs.
16. Selling and service skills: Ability to use a consultative needs identification approach to selling products and providing services to members.
17. Communications skills: Ability to express one's self verbally and in writing in a convincing manner in both individual and group situations; persuasive, an effective listener, presents ideas well.
18. Technical skills: Ability to perform specific tasks. Has a functional command of the organization's data processing system. Possesses the following personal computer skills: (a) word processing (b) database development (c) report development (d) spreadsheet use.

#### **Minimum Training and Experience:**

1. AAS degree in business administration or equivalent experiences with a financial institution or other organization which can be transferred to this position.
2. At least five years of progressively more responsible experience within a financial services organization which has provided opportunity to gain the necessary experience and background knowledge to manage a full service branch office.
3. Supervisory experience and training.
4. Notary Public, State of New York.

#### **Physical Requirements**

1. Ability to stand 75% of the time and regularly travel throughout the retail store.
2. Ability to use keyboard, monitor, telephone, and other standard office equipment.
3. Ability to communicate effectively with others in person and via telephone, email, and written documents.
4. Ability to decipher data contained in documents, reports, spreadsheets, etc., presented both on paper and electronically.
5. Ability to lift and move heavy objects (i.e. box of copy paper - approx. 20 lbs.).
6. Must possess a valid driver's license and be able to travel within the Wayne, Ontario, and Monroe County area.

**To Apply:**

Email or mail your resume and cover letter to:

careers@reliantcu.com

Attn: Careers  
10 Benton Place  
PO Box 40  
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