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## POSITION DESCRIPTION

**POSITION TITLE:** Branch Manager

**DEPARTMENT:** Operations

**CLASSIFICATION:** Exempt

**APPROVED BY:** COO

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### REPORTING RELATIONSHIPS

**POSITION REPORTS TO:** VP Member Services

**POSITIONS SUPERVISED:** ASSISTANT BRANCH MANAGER AND BRANCH PERSONNEL

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### POSITION PURPOSE

Responsible for direction and administration of branch operations. Ensures established policies and procedures are followed. Oversees the provision of a full range of services to customers and prospective customers. Ensures customers are promptly and professionally served. Trains, directs, and supervises branch staff. Performs various branch functions as required and other duties as assigned.

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### ESSENTIAL FUNCTIONS AND BASIC DUTIES

1. **Responsible for supervision of branch operations.**
  - a. Ensures operations are conducted in accordance with established Company policies, legal and regulatory requirements, and audit standards. Looks for ways to improve effectiveness.
  - b. Ensures branch security. Opens and closes the building in accordance with set hours.
  - c. Ensures the branch balances all transactions at the close of each day. This may include proofing Tellers, running related reports, and balancing the vault at the end of each day. Provides assistance to branch personnel as needed. Ensures completion of month-end certification of all cash items and negotiable instruments.
  - d. Assists with Member Service Officer functions. Performs duties related to loan processing, certificates of deposit, and IRAs. Handles direct deposit functions and safe deposit boxes. May open new customer accounts and close/disburse loans.

- e. Promotes branch business development and seeks to broaden customer base. Actively cross sells Company products and services and Bank at Work.
  - f. Acts as a Loan Officer, processing and approving customer loans within established policies and limits.
  - g. Completes required reports and records and ensures that branch functions are properly documented.
  - h. Implements changes to established policy and procedures within the branch.
2. **Assumes responsibility for establishing and maintaining effective coordination and working relations with branch personnel.**
- a. Provides leadership through effective objective setting and communication. Provides assistance, direction, and supervision of branch personnel.
  - b. Conducts regular meetings with branch employees to inform, train, and coach. Reviews and monitors the work of branch personnel. Coordinates weekly activity.
  - c. Ensures orientation of new employees. Coordinates and often leads staff training sessions. Ensures personnel are well trained in all phases of their respective jobs. Performs cross training as necessary. Conducts Security training.
  - d. Determines appropriate staffing levels and scheduling of employees. Approves PTO for branch personnel and ensures accurate payroll/attendance records.
  - e. Tracks individual progress and conducts performance appraisals. Formulates and implements corrective actions as needed.
3. **Assumes responsibility for establishing and maintaining effective, professional business relations with customers.**
- a. Ensures requests and questions are promptly and courteously resolved. Answers or refers questions as appropriate. Verifies deposits and provides payoff and other quotes. Resolves member issues.
  - b. Ensures customers are informed of SW66 services, products, and policies. Cross sells products and services.
  - c. Ensures SW66's professional reputation is maintained.
4. **Assumes responsibility for related duties as required or assigned.**
- a. Ensures branch operations are well coordinated with other departments.
  - b. Manages expenses and looks for cost-savings measures.
  - c. Continually seeks ways to improve branch operations and productivity to meet established goals.
  - d. Prepares branch activity reports and recommends improvements.
  - e. Ensures proper maintenance and general housekeeping of the building, grounds, work areas, desks, and equipment.
  - f. Ensures adequate supplies, forms, and equipment available for personnel.

- g. Keeps management informed of branch activities, progress toward established goals/objectives, and of any significant issues.
  - h. Other duties as assigned.
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## PERFORMANCE MEASUREMENTS

1. Branch services are efficiently and effectively delivered in accordance with established SW66 policies and standards.
  2. Good business relations exist with customers and their questions and problems are promptly resolved.
  3. Branch personnel well trained and efficient. Activities well coordinated. Good working relations exist with branch personnel. Assistance is provided as needed.
  4. Required reports and records are accurate and timely.
  5. Management is appropriately informed of area activities and of any significant problems. Branch transactions, loan volumes, expenses, and profitability are in line with Company standards.
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## QUALIFICATIONS

- EDUCATION/CERTIFICATION:** High school graduate or equivalent. Additional coursework preferred.
- REQUIRED KNOWLEDGE:** Thorough knowledge of SW66 products, services, and policies.  
Understanding of Teller and Member Service Officer functions.  
Knowledge of Loan Underwriter/Processor duties.
- EXPERIENCE REQUIRED:** **Five years** of related operations experience required with a minimum of two years supervisory experience.
- SKILLS/ABILITIES:** Strong interpersonal and communication skills.  
Well organized.  
Able to operate related computer applications and basic business equipment.  
Good marketing skills.  
Good supervisory abilities.
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## PHYSICAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

- REPETITIVE MOTION:** Movements frequently and regularly required using the wrists, hands, and/or fingers.
- TALKING:** Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.
- AVERAGE VISUAL ABILITIES:** Average, ordinary, visual acuity necessary to prepare or inspect documents or products, or operate machinery.
- AVERAGE HEARING:** Able to hear average or normal conversations and receive ordinary information.
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**PHYSICAL STRENGTH:** Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally. (Almost all office jobs.)

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## **WORKING CONDITIONS**

**NONE:** No hazardous or significantly unpleasant conditions (such as in a typical office).

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## **MENTAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION**

**REASONING ABILITY:** Ability to apply logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions.  
Able to interpret a variety of technical instructions and can deal with multiple variables.

**MATHEMATICS ABILITY:** Ability to compute discount, interest, profit, and loss; commission markup and selling price; and ratio, proportion, and percentage.  
Able to perform very simple algebra.

**LANGUAGE ABILITY:** Ability to read periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias.  
Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style. Ability to conduct training, communicate at panel discussions, and make professional presentations.

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## **INTENT AND FUNCTION OF JOB DESCRIPTIONS**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*