



Operations Manager

DEPARTMENT: Operations

REPORTS TO: Chief Retail Operations Officer (CROO)

WAGE CATEGORY: Exempt

Part 1: Description of Position

The Operations Manager is responsible for the supervision of the Teller and Member Services staff members within the Operations Department.

This individual will:

- Resolve escalated member problems.
- Guide and advise staff in the efficient handling of member needs and accurate transactional processes.
- Serve as liaison between member services and executives.

Part 2: Principal Responsibilities and Duties

1. Under the direction of the Chief Retail Operations Officer (CROO), supervise the daily operations of the credit union's two branches to include oversight of both the staff and daily process of the Teller Line and the Member Services area.
2. Effectively manage and evaluate the work performance of all Teller and Member Services staff to ensure that performance benchmarks as well as member needs are being met with respect to the overall goals and strategic plan of the organization.
3. Ensure that staff is trained and cross-trained in all phases of their specific responsibilities to ensure the delivery of quality service to members, and to ensure accuracy in transactions.
4. Maintain a positive, member-first attitude and ensure that appropriate and professional communication is exchanged with all members and fellow staff.
5. Consistently seek opportunities to a) improve member experience, b) increase efficiencies without sacrificing service and c) make the credit union a pleasant and rewarding place to work for fellow staff.
6. Maintain a comprehensive, working knowledge of all State and Federal regulations as well as credit union policies and procedures that are applicable to the functions performed within the

Teller and Member Services areas. Provide the staff with policy and procedural updates and implement them in a timely fashion.

7. Develop, apply and evaluate policies and procedures for the department when necessary under the direction of the CROO.
8. Research and resolve member account problems and complaints, and direct the member to the proper person or department for specific guidance, if necessary. Respond to inquiries beyond the authority of non-management personnel. Ensure that professional communication is exchanged with all members by staff.
9. Open new accounts and service existing accounts while actively promote credit union products and services based on needs that are obtained from member interviews.
10. Develop and maintain a relationship with key vendors that provide functions vital to the Operations Department.
11. Serve as a primary project team member, and occasionally project manager for projects related to functions within the Operations Department.
12. Serve as the primary liaison for our cash delivery service, including ordering cash and currency from the Federal Reserve, verifying cash received, maintaining full vault security, servicing and balancing ATMs and balancing vault cash regularly.
14. Other duties as assigned by CROO.

Part 3: Physical Requirements

Must be able to physically perform the basic life operational support functions of stooping, kneeling, reaching, standing, walking, fingering, talking, hearing, and repetitive motions. Must be able to perform sedentary work exerting up to 10 pounds of force occasionally, and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Must possess the visual acuity to compile and compute data and statistics, operate a computer terminal, read extensively and proofread materials.

Part 4: Position Requirements and Qualification Guidelines

1. Bachelor's degree in a Business related field.
2. Minimum of three years of financial institution operational experience (preferably in a credit union).
3. Strong sales-oriented customer service skills; and a thorough knowledge of all credit union systems, (retail and operations) with experience in researching records and problem resolution.

4. Ability to effectively manage both personnel and process(es).
5. Ability to effectively communicate in writing and orally.
6. Proficiency in Microsoft Office, with an emphasis on Microsoft Word and Microsoft Excel.

NOTE: This position description is intended to describe the general nature and level of work being performed by people assigned to this job. It is not intended to be an exhaustive list of all requirements, duties, and responsibilities required by personnel so classified.