



Position Title: Assistant Branch Manager

Status: Full-time, Regular, Exempt

Location: San Jose, CA

POSITION SUMMARY:

The Assistant Branch Manager (ABM) supervises and coordinates activities of all branch staff (MSR, LSR, MSS, or others) and reports to the Branch Manager (BM) or other designee. The ABM oversees, coaches and trains all branch staff in promoting products and services, member transactions, balancing daily settlements, and meeting member needs. They assist the BM in conveying a feeling of trust, service, security and satisfaction to members and staff.

The duties of the ABM are contingent on the scope of the services offered at the branch. They may be responsible for overseeing the teller function, ATM balancing, night depository processing, cash shipment, and member service duties. They must also have a keen familiarity with credit union products and services.

In the absence of the Branch Manager, the ABM is responsible for all branch operations and performs all functions according to the policies & guidelines of the credit union in a friendly, helpful manner.

PRINCIPLE DUTIES AND RESPONSIBILITIES:

In addition to having mastered the responsibilities of the Member Service Supervisor (MSS), the ABM is also responsible for the following duties and responsibilities:

BRANCH OPERATIONS/STAFF SUPPORT

- Ensure workstations are organized and equipped for the start of the business day.
- Prioritize daily, weekly, and monthly calendars ensuring that the branch is properly staffed and that everyone's time is maximized to serve the members.
- Provide guidance to branch staff, as appropriate, with more difficult transactions.
- Maintain effective branch operations including, timely opening and closing, adequate staffing levels, and effective member service.
- Assist with overseeing branch office operations to ensure that policies, procedures and regulations are being followed.
- Examine, evaluate, and process consumer loan applications and/or supervise others engaged in this task.
- Give approval for overrides on cash withdrawals and other transactions based on authorization limits.
- Conduct surprise cash drawer audits.

- Conduct staff meetings, including training and/or providing regulatory or processes updates. Models great customer service for staff.
- Complete self-assessments, if applicable, and ensure they are completed thoroughly and accurately and on time.
- Participate and/or lead performance and accountability sessions with branch staff in conjunction with the Branch Manager.
- The ABM participates, as appropriate, in regular Branch Audit activities.
- Participates in hiring and selection process in conjunction with Branch Manager.
- Open and explain services to potential account members to generate additional business.

BRANCH AND STAFF GOALS

- Be responsible for on-the-job training of all new branch staff.
- Assist with developing branch level production goals and plans to achieve them.
- Participate with Branch Manager in developing personal performance goals of Member Service Representatives, Member Service Supervisor, and Loan Service Representatives.
- Assist in the origination of consumer loans.
- In some branches, some ABMs may also be trained and responsible in the origination of mortgage loans.
- Participate (with BM) on the coaching of staff in member relationship-building.
- Oversee training of new employees, develop work schedules, and monitor work performance.
- Evaluate and adhere to established branch policies, procedures and protocols.
- Support the Branch Manager in hiring, Catalytic Coaching, and performance management of branch staff.

MEMBER SERVICING/OTHER

- Resolve member account-related problems and ensure positive public relations.
- Explain services to potential personal and business account members to generate additional business for the credit union.
- Adhere to general regulatory procedures including requirements of the Bank Secrecy Act and Anti Money Laundering rules.
- Actively support business development activities including attending in person, or staffing properly so that staff may attend.
- Perform other duties and projects as assigned.

MINIMUM QUALIFICATIONS AND REQUIREMENTS

- High School graduate or equivalent.
- An acceptable combination of progressive experience in management, cash-handling, and/or customer service.
- Either two years' work experience at Self-Help or four years' work experience in a similar environment.
- Preference for working in organizations that place priority on teamwork and collaboration
- Strong commitment to our mission – creating economic opportunity for traditionally underserved communities.
- Ability to demonstrate Self-Help's Core Values:

- Mission Before Self
- Service With Excellence
- Embracing & Promoting Change
- Results Not Credit
- Diversity as a Strength
- Financial Sustainability for Mission Impact
- Experience in developing and/or supervising branch staff.
- Excellent customer service skills.
- Demonstrated ability to communicate effectively – both verbally and in writing.
- Working knowledge of computer software systems – New Solutions and Microsoft Office (Excel, Word, and Outlook) and ability to be trained and efficiently operate credit union systems and proprietary software.
- Keen attention to detail, ability to effectively organize and prioritize work.
- Analytical and problem solving skills.
- Ability to use keyboard and data entry skills. Strong interpersonal/ people management skills.
- May be required to travel to cover other branches.
- Bilingual fluency may be required.
 - Ability to work flexible work hours including evenings and weekends.

PHYSICAL REQUIREMENTS/WORK ENVIRONMENT

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Close vision is required.
- Employee is regularly required to: sit; talk and hear; use hands to finger, handle or feel; and reach with hands and arms.
- Employee is frequently required to type and use a keyboard.
- The employee must occasionally lift and/or move up to 20 to 40 pounds.

This position description is intended to describe the duties most frequently performed by an individual in this position. It is not intended to be a complete list of assigned duties but to describe a position level. Furthermore, the essential functions are listed above and reasonable accommodations will be made to meet the requirements of the American with Disabilities Act.

About Self-Help Federal:

Self-Help Federal Credit Union was chartered in 2008 to build a network of branches that serve working families and underserved communities. With 17 branches in California, 9 branches in Illinois, and 1 branch in Wisconsin, over \$1 billion in assets, and serving more than 74,000 members, Self-Help Federal is one of the fastest-growing low-income designated credit unions in the country. It is part of the national Self-Help family of non-profit organizations whose collective mission is to create and protect ownership and economic opportunity for all. For 38 years, the Center for Community Self-Help and its affiliates have provided \$8.5 billion in financing to help over 158,000 low-wealth borrowers buy homes,

start and build businesses, and strengthen community resources. For more information, go to www.self-helpfcu.org and www.self-help.org.

We are an equal opportunity employer:

SHFCU is committed to providing equal employment opportunities to all persons regardless of race, color, class, age, religion (and lack thereof), disability that can reasonably be accommodated, marital status (including domestic partner status), ancestry, nationality, national origin, family status, sex (including pregnancy, childbirth, and related medical conditions), other medical condition (physical or mental), AIDS/HIV status, genetic information, sexual identity, gender identification (including transgender status), sexual orientation, and veteran status.

Compensation:

Competitive nonprofit salary, based on experience, plus a generous benefits package that includes health, dental, life insurance, flexible spending plan, retirement plan, and paid parental leave.

Please apply to our Human Resources Department:

Interested individuals please send a resume and cover letter to cahiringmanager@self-helpfcu.org and reference this job, "Assistant Branch Manager, San Jose" in the subject line of your message. Please visit our website at www.self-helpfcu.org/who-we-are/resources/careers to view the complete job description, as well as all of our other current job openings.

The Self-Help Federal Credit Union is an Equal Opportunity Employer