

### **POSITION SUMMARY:**

Manage assigned branch toward a strong economic performance including: achieving branch goals and budgets; community relations and new business development; originating mortgage loans; staffing branch operations; supervising and developing member service representatives; ensuring effective and efficient member service, maintaining adherence to branch operating policies, procedures, and regulations and maintaining appropriate facilities, equipment and physical security.

### **PRINCIPAL DUTIES & RESPONSIBILITIES:**

- Manage the branch toward a strong economic performance; developing and implementing plans to achieve sales and operational goals.
- Develop and execute action plans to improve operational policies, procedures and controls, and mitigate controllable losses in operations.
- Operate within assigned credit authority to approve or deny loans as provided by law and Credit Union Policy.
- Oversee the physical facilities, equipment and physical security of the branch office, and establish appropriate safety practices for employees.
- Ensure adherence to operational policies, procedures, and controls to ensure the safety and security of employees, members and credit union assets and compliance with regulations.

### **SALES AND BUSINESS DEVELOPMENT**

- Conduct community relations and new business development to enhance credit union reputation and demand for products and services.
- Manage relationships with key community stakeholders and members.
- Develop and execute action plans to improve sales processes and increase sales.
- Lead Branch sales meetings.

### **STAFF MANAGEMENT AND DEVELOPMENT**

- Coach Assistant Branch Manager and Branch Supervisors in sales, customer service and staff management.
- Coach Branch Management in developing and building branch staff engagement.
- Responsible for hiring, employee development, performance management, and compensation review for branch staff.

### **MORTGAGE LENDING**

- Develop mortgage loan business by developing referral networks and community and member outreach
- Pre-qualify loan applicants by examining borrower information and documentation, assessing credit-worthiness, determining adequacy of income, credit and collateral and calculating repayment risk
- Identify and explain mortgage options for each borrower

- Approve or deny mortgage loan pre-qualifications and explain reasons for denial
- Originate a complete and accurate mortgage application and provide timely and accurate disclosures

## **OTHER**

Perform other duties and projects as assigned.

## **EDUCATION AND/OR EXPERIENCE**

- Bachelor's degree or equivalent combination of education and/or experience
- Five (5) to seven (7) years of banking or retail experience including two (2) to three (3) years of supervision.
- Prior sales or sales management experience in a financial institution, retail or service industry preferred.

## **KNOWLEDGE, SKILL AND ABILITY**

- Demonstrate Self-Help's corporate competencies for managers:
  - Mission and Values
  - Standards of Excellence
  - Teamwork and Collaboration
  - Initiative and Follow-Through
  - Customer Focus
  - Communication
  - Managing and Performance Accountability
  - Coaching and Developing People
  - Decision-Making
- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Extensive knowledge of bank products, policies, procedures, services, operations and audit/compliance.
- Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- Analytical and problem solving skills
- Proficient with Microsoft Word, Excel and PowerPoint
  - May be required to travel to cover other branches.
  - Flexibility in working hours, including evenings, weekends and holidays
  - English/Spanish fluency is required.

## **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.
- The employee is regularly required to: walk and stand; use hands to finger, handle or feel; type and use a keyboard; talk and/or hear; and reach with hands and arms.
- The employee is occasionally required to sit.
- The employee must occasionally lift and/or move up to 10 pounds.

### **About Self-Help Federal:**

Self-Help Federal Credit Union was formed in 2008 to build a network of credit union branches to operate on a scale uncommon in the community development industry. Through a series of mergers, acquisitions, and new branch launches in California, Illinois, and Wisconsin, we have built a community development credit union that aims to provide high-impact financial services to low income and working class communities.

Self-Help Federal now has 30 branches, over \$1.1 billion in assets, and serves more than 80,000 members. We are committed to delivering safe and affordable savings, transparently-priced accounts and a full suite of loans – small dollar, citizenship, unsecured consumer, auto, and mortgage – often to borrowers who could not access responsible services elsewhere.

Self-Help Federal is part of the Self-Help family of non-profit organizations with a common mission and leadership. Over its 37-year history, Self-Help has learned that access to responsible savings, loans, and transactions is key to financial security, family healthy, and improved opportunity for low-income families. Self-Help has delivered \$7.6 billion in financing through more than 137,000 loans to families, individuals, and organizations across the nation.

### **We are an equal opportunity employer:**

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

### **Application:**

Interested individuals please send a resume and cover letter to [cahiringmanager@self-helpfcu.org](mailto:cahiringmanager@self-helpfcu.org) and reference this job, "IT Manager Member Systems" in the subject line of your message.

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