UNIVERSITY OF SOUTHERN CALIFORNIA

Credit Union Operations Manager

Job Code: 115047

Grade: J
OT Eligible: No
Comp Approval: 9/11/2015

JOB SUMMARY:
Manages daily operations of a Credit Union branch/department including supervision of staff, loan application processing, underwriting and funding, new member applications, service delivery, sales, mitigating losses and reporting. Approves member transactions and resolves member issues. Has responsibility for the overall compliance with operational regulations and guidelines related to branch activities. Creates, trains and coaches a sales, service and referral team. Ensures all loan and membership applications, email and other member inquiries are processed in an expedient manner and with the upmost care.

JOB ACCOUNTABILITIES:

<table>
<thead>
<tr>
<th>*E/M/NA</th>
<th>% TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>______</td>
<td>______</td>
</tr>
</tbody>
</table>

Manages all daily Credit Union branch/department functions including supervision of staff, loan application processing, underwriting and funding, new member applications, service delivery, sales, mitigating losses and reporting. Ensures daily operations are completed in an expeditious manner and all organizational initiatives are met.

Develops, proposes and gains approval for the establishment or revision of new and existing operations programs, products, policies and procedures to best meet member service and organizational goals.

Serves as central information resource and advises on departmental policies and procedures. Researches information as requested. Offers solutions in line with policies and procedures including making exceptions, as necessary

Manages branch/department staff, as assigned. Recommends organization structure, reporting relationships and staffing needs. Recruits, screens, hires and trains staff. Evaluates employee performance and provides guidance and feedback to assigned staff. Counsels, disciplines, and/or terminates employees as needed. Oversees onboarding and orientation of new employees to ensure understanding of duties, responsibilities, work requirements and performance standards. Establishes, monitors, and authorizes work schedules, time off and leave requests for employees (including student workers) to meet department business requirements. Authorizes overtime and monitors meal and rest periods for nonexempt employees to ensure compliance with university timekeeping requirements and employment policies. Submits time records on behalf of employees who fail to provide timekeeping records to ensure timely payment, as needed.

Has responsibility for meeting daily, weekly and monthly sales goals. Applies coaching techniques on a consistent basis to assist staff in meeting sales and service goals.

Has responsibility for ongoing monitoring and review of branch operations and provides recommendations and solutions to improve the branch experience for members.
Provides ongoing monitoring and review of the virtual branch member experience to ensure continuous process improvement. Initiates recommendations and provides solutions for improvement. Works directly with Credit Union Marketing and IT departments to review, modify and implement changes.

Provides ongoing monitoring, review and performance of the Credit Union’s Call Center activities. Ensures volume levels are in line with expectation and abandonment rate is maintained at a low level. Has responsibility for meeting member service/performance targets and planning areas of improvement or development. Ensures calls are answered by staff within agreed time scales, in an appropriate manner, and meet performance targets for speed, efficiency, sales and quality of calls received.

Maintains professional and technical knowledge by tracking emerging trends in branch operations management. Attends education workshops and reviews professional publications.

Develops and implements security related procedures such as office opening and closing routines, recognition of duress signals and key controls. Coordinates security activities with university Public Safety Department. Promotes and maintains standards for security conscious awareness and behavior. Maintains knowledge of university’s crime prevention and suppression programs and services. Ensures dissemination of security related information to staff.

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

**EMERGENCY RESPONSE/RECOVERY:**

<table>
<thead>
<tr>
<th>Essential</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

**JOB QUALIFICATIONS:**

**Minimum Education:**
High school or equivalent

**Minimum Experience:**
3 years

**Minimum Field of Expertise:**
Management level experience in a credit union operations in an institution of similar asset size.

**Preferred Education:**
Bachelor’s degree

**Skills:** Other:
Analysis
Assessment/evaluation
Budget control
Communication -- written and oral skills
Conflict resolution
Counseling
Customer service
Human resource process and employment knowledge
Interpretation of policies/analyses/trends/etc.
Interviewing
Knowledge of applicable laws/policies/principles/etc.
Organization
Planning
Problem identification and resolution
Project management
Research
Scheduling
Staff development
Supervisory skills
Teaching/training

Skills: Machine/Equipment:
Calculator
Computer network (department or school)
Computer network (university)
Computer peripheral equipment
Fax
Personal computer
Photocopier

Supervises: Level:
Supervises employees who do not supervise.

SIGNATURES:
Employee: _______________________________ Date: _______________________________
Supervisor: ______________________________ Date: _______________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

The University of Southern California is an Equal Opportunity Employer