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## POSITION DESCRIPTION

**POSITION TITLE:** Branch Operations Manager - Stoneledge    **DEPARTMENT:** Branch Operations

**CLASSIFICATION:** Non-Exempt

**PREPARED BY:** Human Resources

**DATE PREPARED:** November 23, 2022

**APPROVED BY:** Vice President of Branch Operations

**DATE REVISED:** December 19, 2025

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## REPORTING RELATIONSHIPS

**POSITION REPORTS TO:** VP of Branch Operations

**POSITION SUPERVISED:** Branch Operations Specialists/Representatives

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## POSITION PURPOSE

The Branch Operations Manager is responsible for overseeing daily branch operations, delivering excellent member service, supporting staff development, and ensuring compliance with all Credit Union policies, procedures, and regulatory requirements. This role promotes the Credit Union's culture and values while ensuring efficient operations, accurate transactions, and positive member experiences across all points of access.

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## ESSENTIAL JOB FUNCTIONS AND DUTIES

### Leadership & Staff Management

- Promote the Credit Union's **SCOPE** culture to employees, management, and members.
- Maintain a highly motivated, well-trained staff and foster positive employee relations.
- Evaluate branch staff performance to ensure quality work and service to members.
- Oversee time approvals, timesheets, and daily operations scheduling.
- Encourage staff to cross-sell Credit Union products and services.
- Serve as backup to Operations Representatives and Operations Specialists as needed.
- Maintain positive working relationships with all Credit Union employees.
- Work with other Branch Managers on member issues, quarterly/yearly goals, reports and schedules.

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### Member Service & Experience

- Ensure excellent member service across all points of access, including in-branch, ITM, and phone interactions.
- Respond to and resolve member inquiries received through ITM, online and phone channels in a timely and professional manner.
- Handle escalated member issues and make sound judgment decisions with minimal supervision.

- Process member transactions accurately with minimal to no errors.
- Work efficiently between multiple service channels while maintaining service quality.
- Quote loan payoffs and assist members with account inquiries.
- Ensure prompt delivery of lending and account documents via DocuSign.

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#### **Branch Operations, ITM & Cash Management**

- Monitor branch activity including ITM transactions, transaction volume, teller errors, and cross-selling goals.
- Actively work ITM sessions to assist members with deposits, withdrawals, payments, transfers, and general account inquiries.
- Authenticate member identity and ensure secure ITM transactions in accordance with Credit Union procedures.
- Monitor ITM queues and service levels to ensure timely member response.
- Troubleshoot basic ITM issues by reporting issues to Remote Cash, as needed.
- Complete end-of-day balancing and assist staff as needed.
- Process operational overrides and ensure transactions are completed accurately and in compliance.
- Audit, analyze, and work various operational and ITM or credit union performance reports.

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#### **Compliance, Risk & Reporting**

- Complete Currency Transaction Reports (CTRs) and Suspicious Activity Reports (SARs).
- File loan claims including credit life/disability, GAP, and warranty refunds.
- Upload proof of insurance and provide required documentation to members.
- Complete paperwork for bank wires and stop payments on check and ACH items.
- Follow all federal, state, and Credit Union security and confidentiality requirements.
- Complete required annual training including BSA, MIP, OFAC, Privacy, and Electronic Use.
- Ensure all safety and security procedures are followed.

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#### **Facilities, Resources & Community Involvement**

- Maintain branch facilities, including interior and exterior areas.
- Ensure branch employees have appropriate tools and resources.
- Stay aware of community activities and encourage Credit Union involvement.
- Travel between and/or work in various branch locations as required.
- Work a rotating shift and occasional weekends.

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#### **Communication & Problem Solving**

- Analyze situations, identify problems, and recommend solutions.
- Communicate operational developments or issues to the VP of Branch Operations.
- Troubleshoot operational issues and report procedural or personnel concerns as appropriate.

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#### **Other Duties**

- Perform other related duties as assigned.

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### **KNOWLEDGE AND SKILLS**

Ability to apply logic to define problems, collect data, establish facts, and draw conclusions.

Ability to interpret instructions and can deal with multiple variables.

Basic knowledge and use of Microsoft Office Suite and other office equipment.

Strong computer skills.

Displays a professional appearance, demeanor, and dress at all times.

Excellent oral and written communication skills.

Solid interpersonal skills.

Effective time management and project management abilities.

Ability to function and form decisions with minimum to no supervision.

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## **EDUCATION AND EXPERIENCE**

Bachelor's Degree from a four (4) year university or college in a related field, or four (4) to six (6) years experience, or any similar combination of education and experience. Must have a minimum of two (2) years' experience in a financial institution and a minimum of one (1) year supervisory experience.

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

Talking: Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.

Average Hearing: Able to hear average or normal conversations and receive ordinary information

Repetitive Motion: Movements frequently and regularly required using the wrists, hands, and/or fingers. Requires repetitive stooping, kneeling, or crouching.

Average visual abilities: Average, ordinary, visual acuity necessary to prepare or inspect documents or products or operate machinery.

Physical strength: Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally.

Finger Dexterity: Using primarily just the fingers to make small movements such as typing, picking up small objects, pinching fingers together, feel objects, tools, or controls.

## **WORKING CONDITIONS**

No hazardous or significantly unpleasant conditions. Noise level is usually moderate.

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The above statements are intended to describe the general nature and level of work being performed by people assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, skills, or working conditions. Additional functions and requirements may be assigned by supervisors as deemed appropriate.

Position descriptions are not intended 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.

I have read and received a copy of the position description.

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Employee

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Date