

# *Western Rockies Federal Credit Union*

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## **POSITION DESCRIPTION**

**POSITION TITLE:** Operations Supervisor

**DEPARTMENT:** Branch Operations

**CLASSIFICATION:** Full Time

**APPROVED BY:** President/CEO

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### **REPORTING RELATIONSHIPS**

**POSITION REPORTS TO:** Grand Junction Branch Manager

**POSITIONS SUPERVISED:** Tellers, Member Service Representatives, Receptionists

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### **MISSION STATEMENT**

As a credit union team member, each associate is expected to receive members in person and by telephone, to provide general credit union information to actively cross-sell credit union products and services and is responsible for superior service to the membership.

Associates will always keep member's transactions and other credit union business in strictest confidence.

Associates will support the credit union mission statement.

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### **POSITION PURPOSE**

Responsible for implementing existing policies, procedures, and systems involving cashing and member service operations. Coordinates, directs, and assigns work. Answers questions, resolves more complex problems, and oversees balancing. Oversees provision of a full range of services (including phone and mail) to members and prospective members. Ensures that members are promptly and professionally served. Actively cross sells Credit Union services.

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### **ESSENTIAL FUNCTIONS AND BASIC DUTIES**

1. **Assumes responsibility for ensuring and performing efficient, effective, and professional teller operations.**
  - a. Ensures that all Teller functions are correctly performed and are in accordance with established policies and standards. Ensures that all security procedures are followed.
  - b. Coordinates Lobby operations by assisting in assigning work and distributing work flow.
  - c. Answers questions, solves problems, and assists with complex transactions and sensitive member relations problems. Explains policies and procedures to members. Makes judgments for Department staff (within limits of authority) pertaining to cashing and/or accepting checks or drafts.

- d. Assists in finding balancing errors. Ensures that each Teller balances at the end of each day and that all monies are secured in accordance with established procedures.
- e. Receives share deposits and loan payments in person or by mail.
- f. Processes cash advances, travelers' checks, gift cards, teller checks, cashier's checks, money orders, government bonds, and similar transactions.
- g. Maintains an inventory of cashier's checks, teller checks, money orders, traveler's checks, travel cards, gift cards and other negotiable items for use in the Teller area.
- h. Monitors and assists with vault functions.
- i. Performs cash and security audits.
- j. Verifies transactions. Monitors deposit amounts, and examine documents for endorsement and negotiability. Detects and resolves discrepancies promptly.
- k. Monitors department productivity.

2. **Assumes responsibility for ensuring and effectively performing member services functions.**

- a. Ensures that member services functions are performed in accordance with established policies and standards.
- b. Resolves members' requests, problems, and questions promptly. Answers members' questions or refers appropriately.
- c. Presents and explains Credit Union services and products to members and assists in meeting their financial needs.
- d. Answers questions and solves problems for members by listening to problems, collecting data, securing answers, and reporting results to the inquiring party. Resolves member bookkeeping and checking account problems. Takes stop payment orders.
- e. Receives and directs members and telephone calls. Responds to inquiries and questions if possible or directs them as necessary. Records and relays messages.
- f. Performs file maintenance and account changes as needed.
- g. Keeps members informed of Credit Union services and policies, including types of available accounts, interest and dividend rates, payroll deduction options, and other related services.
- h. Maintains and projects the Credit Union's professional reputation. Maintains privacy of member account information.
- i. Actively cross sells Credit Union products and services.

3. **Effectively supervises area personnel, ensuring optimal performance.**

- a. Provides leadership to personnel through effective objective setting, delegation, and communication. Works with employees to establish and meet Department and individual goals.

- b. Ensures that personnel are well trained, effective, optimally used and scheduled. Provides instruction regarding policy, procedure, service and product offerings.
  - c. Conducts regular Department meetings, development coaching and one-on-ones.
  - d. Conducts and/or submits performance appraisals and time cards.
4. **Assumes responsibility for establishing and maintaining effective communication and coordination with Department and area personnel and with management.**
- a. Coordinates Teller, Member Service and Reception duties and responsibilities with related functions within and outside of the Department.
  - b. Keeps management informed of area activities and of any significant problems. Provides suggestions for improved service.
  - c. Completes required reports and related documents promptly and accurately.
  - d. Attends meetings as required.
5. **Assumes responsibility for related duties as required or assigned.**
- a. Ensures that work areas and equipment are clean and well maintained.
  - b. Performs procedures for opening and closing of operations, including vault, alarm, and door duties.
  - c. Replaces Tellers, Member Service Representatives and Receptionists as needed.
  - d. Performs related clerical functions as required.
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## **PERFORMANCE MEASUREMENTS**

- 1. Teller and Member Service functions are efficiently, accurately, and effectively performed in accordance with established policies and standards.
  - 2. Security procedures are understood and adhered to by all Operations Staff.
  - 3. Monies are balanced and any discrepancies promptly resolved.
  - 4. Documents, files, records, and reports are current, correct, and submitted timely.
  - 5. Good business relations exist with members. Members' problems or questions are courteously and promptly resolved.
  - 6. Good working relationships and coordination exist with area personnel and with management. Management is appropriately informed of area activities.
  - 7. Department personnel are well trained, optimally scheduled, and effective. Appropriate training and assistance are provided as needed. Good communication and coordination exist.
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## QUALIFICATIONS

**EDUCATION/CERTIFICATION:** High school graduate or equivalent. .

**REQUIRED KNOWLEDGE:** Strong understanding of member service principles.  
Knowledge of human resource policies and recruiting techniques.  
Understanding of Credit Union philosophy.  
Knowledge of basic accounting.

**EXPERIENCE REQUIRED:** Previous banking or credit union experience preferred. Sales, coaching and staff development experience required.

**SKILLS/ABILITIES:** Excellent communication, motivation and leadership skills.  
Supervisory and training abilities.  
Able to organize multiple projects.  
Solid oral and written communication abilities.  
Ability to operate related computer software, and other business equipment including 10- key, money counters, and telephone.

**EDUCATIONAL COURSES REQUIRED** (Within 6 month probationary period of hire date)

**Staff Training and Recognition Program (STAR) courses as follows:**

**Core Modules**

Credit Union Orientation  
Member Relations  
Security

**Member Services Modules**

Money and Negotiable Instruments  
Member Services  
Cross-Selling

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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.

**FINGER DEXTERITY:** Using primarily just the fingers to make small movements such as typing, picking up small objects, or pinching fingers together.

**AVERAGE VISUAL ABILITIES:** Average, ordinary, visual acuity necessary to prepare or inspect documents or products, or operate machinery.

**PHYSICAL STRENGTH:** Sedentary work; sitting 50% of the time. Exerts up to 25 lbs. of force occasionally. (Almost all office jobs.)

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## **WORKING CONDITIONS**

**NONE:** No hazardous or significantly unpleasant conditions (such as in a typical office).

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

**REASONING ABILITY:** Ability to deal with a variety of variables under only limited standardization.  
Able to interpret various instructions.

**MATHEMATICS ABILITY:** Ability to perform basic math skills and to use decimals to compute ratios and percents, and to draw and interpret graphs.

**LANGUAGE ABILITY:** Ability to use passive vocabulary of 5-6,000 words; to read at a slow rate; define unfamiliar words in dictionaries for meaning, spelling, and pronunciation.  
Ability to write complex sentences, using proper punctuation, and use adjectives and adverbs.  
Ability to communicate in complex sentences; using normal word order with present and past tenses; using a good vocabulary.

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## **INTENT AND FUNCTION OF JOB DESCRIPTIONS**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by supervisors as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as 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.*