

Southwest Montana Community FCU

Department: Teller	Job Description
Job Description Title: Teller Manager	FLSA Status: Non - Exempt
Reports To (Title): President/CEO	Position Status:
Prepared By: Associated Employers	Revision Date: February 2016

Job Summary:

In addition to performing all related teller duties, the Teller Manager is responsible for developing policies and procedures, coordinating cross training of Teller II staff with other departments, effective communication so that the needs of the teller line are met during training and when back up support is to be provided. Good leadership skills and the ability to motivate others are necessary.

Responsible for supervision of the teller area for all branches. Perform all teller functions, solves problems, and assists with complex work-related matters. Provides coaching, training, and supervision to tellers for attainment of performance expectations.

Possesses in depth product knowledge and leads by example. Demonstrates the attributes of a team player, and acts as part of the credit union team. Relates well with members, co-workers, and management team.

Provides quality service and strives to exceed service expectations. Acts in a professional, friendly manner at all times.

Essential Duties and Responsibilities and Expectations:

Includes the following, other duties may be assigned.

- Responsible for initial introductory training for teller staff regardless of final branch destination
- Schedule teller personnel to provide optimal member service.
- Coordinate teller II department cross training based on credit union needs and evaluation of individual abilities.
- Acts as a resource to tellers in processing transactions, handling member situations, balancing cash, and following security rules.
- Troubleshoots problems and provides sound resolutions.
- Instrumental in contributing to branch growth.
- Acts as coach to the tellers ensuring that products are cross sold based on member need.
- Makes judgments for staff (within limits of authority) pertaining to cashing and/or accepting checks or drafts.
- Responsible for branch cash levels, which includes ordering branch cash, following assigned cash levels (change fund), verifying cash received, filling teller cash orders, maintaining vault security and balancing vault cash nightly.
- Ensures tellers adhere to standards, policies, and procedures.
- Provides leadership example and direction in matters of compliance.
- Performs regular teller audits.
- Monitor teller activity including number of transactions, teller errors, etc.
- Provides efficient courteous service as a teller
- Evaluate the job performance of tellers and teller supervisors, prepare and deliver performance evaluations, and act as coach to ensure quality performance.
- Active in in the employment life cycle (recruitment/selection, employee relations, performance management, training and development).

- Evaluate procedures for teller area and makes changes for process improvement.
- Travel to other branches when needed
- Co-Administrate IRA program
- Ensures maintenance of office equipment, coin machine, coin wrapper, etc.
- Close Credit Union branch/office at posted times
- Represent the credit union in a positive and professional manner with all people including fellow employees, members, management, board members and outside vendors.
- Attends and participates in meetings as required.
- Completes required courses as assigned for ongoing compliance and continuing education.
- Report to work on time each scheduled day.

Supervisory Responsibilities:

Carries out supervisory responsibilities in accordance with Credit Union's policies and applicable laws. Overall supervision of the Teller department in all branches; responsibilities include planning, assigning, directing and reviewing work; ensuring credit union standards are met. Is responsible for hiring, terminating, training and development, reviewing performance and administering corrective action to employees; addressing complaints and resolving problems. Plans organizational structure and job content.

Competencies

To perform this job successfully, an individual should demonstrate the following competencies:

- Business Acumen - Understands business implications of decisions; Displays orientation to profitability;
- Strategic Thinking - Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.
- Customer Service - Manages difficult or emotional member situations; Responds promptly to member needs; Solicits feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- Teamwork — Balance team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.
- Managing People - Includes staff in planning, decision-making, facilitating and process improvement; Takes responsibility for subordinates' activities; Makes self-available to staff; Provides regular performance feedback; Develops subordinates' skills and encourages growth; Solicits and applies feedback (internal and external); Fosters quality focus in others; Improves processes, products and services; Continually works to improve supervisory skills.

Qualification Requirements:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- High school diploma or GED
- 5-10 yrs. related experience and/or training
- Minimum of 3 year cash handling experience required
- Minimum 5 years customer service work preferred

- Minimum 3 year of supervisory experience preferred
- Previous teller experience desired
- Equivalent combination of education and experience
- Related work experience may substitute for education

Language Skills

- Ability to read, comprehend and write simple to complex instructions, short correspondence, and memos.
- Ability to effectively present information on one on one and small group situations to members, and other employees of the credit union.

Mathematical Skills:

- Knowledge of basic arithmetic and currency counting.
- Knowledge of financial math principals for IRA's, CD's, Loans including credit cards

Reasoning Ability:

- Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.
- Must have the capability to deal with problems involving several concrete variables in standardized situations.
- Applies highly proficient and specialized skills that allow employee to function in situations that are varied, complex, and/or non-routine.
- Decisions have major implications on the management and operations of an area within a department. Job may contribute to important strategy, operational and business decisions that affect the department.

Certificates, Licenses, Registrations

- Bondable with CUMIS
- IRA Advanced certification required (have or be capable of within 1 year of job acceptance)
- Notary (have or attain within 6 months of job acceptance)
- Valid/Unexpired Driver's License

Other Skills and Abilities

- Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, and other office procedures and terminology.
- Interacting with Computers — Using computers and computer systems (including hardware and software) to enter data, or process information.
- Getting Information — observing, receiving, and otherwise obtaining information from all relevant sources.
- Working directly with the Public — Face to face and phone contact to acknowledge and complete transactions for members and guests.
- Ability to use common office equipment such as computer, fax machine, copier, telephone, etc.
- Ability to accurately handle cash in a speedy manner when dealing with members
- Familiar with differences in a basic number of products and services offered by other

financial institutions to those offered by the credit union.

Physical Demands & Working Conditions:

The work environment characteristics and the physical demands described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate, as is found in a normal business office with computers and printers, and light traffic.

Employee may be exposed to contagious illnesses such as colds and flu by virtue of working with the general public.

Employee may be asked to participate in outdoor activities related to the season for example snow shoveling and de-icing of sidewalks in winter and landscape maintenance during other seasons, weeding, replanting of flowerbeds, etc., as these tasks relate to the overall Branch Office appearance and safety needs.

Employee may be asked to participate and/or coordinate off-site/after-hours credit union activities including but not limited to: Annual Meeting/Dinner, Member Appreciation Day(s) and Credit Union Chapter Meetings, etc. Travel may be necessary.

While performing the duties of this job, the employee is frequently required to stand, perform repetitive hand motion (such as typing); reach with arms and hands; hear; listen; talk; walk; navigate stairways; bend and sit.

Employee must frequently or regularly be able to lift 10 pounds and be able to lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

The above statements are intended to describe the general nature and level of work being performed by the individual assigned this position. This job description is not intended to be an exhaustive list of all responsibilities, duties and skills of the personnel in those positions(s).

I have read and accept the duties and responsibilities as outlined. I have also been given the opportunity to discuss any questions or concerns regarding any or all of the above directly with my supervisor prior to signing this document. Further, I agree to notify my supervisor immediately in the event that I am unable to fulfill any or all of the duties as outlined above.

I understand that Southwest Montana Federal Credit Union reserves the right to revise or change this job description as the need arises.

I have reviewed this job description and received a copy.

Employee Signature/Date