



Job Description

Advanz Credit Union
VP Member Services

Vice President of Member Service Role

Assists in maintaining the quality of service provided by Member Service Representatives and the branches' daily routine; is capable of performing the duties of the Branch Managers, Member Services Representatives, receptionist and other department personnel; is responsible for all savings services, programs, and documentation thereof; is responsible for Member Services Department statistics and reports; is responsible for member services personnel performance; assists in the development and maintenance of smooth, cost effective, and harmonious flow of the related work area.

Essential Functions & Responsibilities

Is knowledgeable of and can perform all Member Service Department duties in accordance with state and federal regulations and credit union policy.

Is skilled in managerial functions including overseeing employees, training and delegating.

Is knowledgeable of proper computer input and functionality for all CU systems and archiving that data on the proper media in a timely and methodical manner.

Responsible for being the Bank Secrecy Officer and for compliance and staff training in all areas relative to Bank Secrecy Act. These include but are not limited to BSA, AML, OFAC, FINCEN, CDD and CIP.

Is knowledgeable of cross selling of services and performs the same.

And such other responsibilities as set forth in credit union policy or assigned from time to time by the Sr. Vice President or the President/CEO.



Vice President of Member Service

Performance Measurements

1. Receives members in person or by telephone; determines the nature of the member's business and either transacts the member's request or refers him/her to the suitable staff person.
2. Provides, in person or by telephone, routine information concerning Credit Union services or policies, including: what is a credit union; eligibility for membership; how to apply for membership; type of accounts available; insurance coverage for shares and loans; basic loan policies; interest rates charged on loans; how dividends are computed on shares; how to start, change, or stop a payroll deduction; the locations, office hours, and telephone service.
3. Maintains the confidential nature of all member transactions, information, and other related operational data as required including the security of all CU operations.
4. Attends meetings, educational and training sessions, as required.
5. Ensures proper orientation and training of new Member Services Department employees; instructs staff of procedure changes that would improve efficiency of member services.
6. Oversees, guides and assists personnel in their efforts to maintain smooth and effective operations.
7. Answers questions for subordinate personnel, and if necessary, requests answers from Senior Management.
8. Authorizes cashing and depositing of members share drafts/checks, and if necessary seeks approval by superiors.
9. Prepares and reviews such daily reports to maintain strong internal controls, including but not limited to the reports required for BSA monitoring.
10. Reports to and assists the Senior Vice President and/or President/CEO, as the situation may warrant.
11. Runs special reports for special projects.
12. Works with President/CEO and the Business Development Officer to achieve the marketing plan and related productivity goals; monitors performance and identifies new services opportunities.



Vice President of Member Service

Performance Measurements cont.

13. Performs such other duties as may be assigned by his/her supervisor which are commensurate with his/her position and in the best interest of credit union operation.
14. Opens/closes the branch in accordance with the schedule.
15. Follow the Bank Secrecy Act Policy and Procedures.

Knowledge and Skills

Experience

Five (5) years' experience in financial institutions, with progressive management experience.

Education

Four (4) year college degree, preferably with a major in business. Two (2) years college level business education may be considered if three (3) years credit union experience is also present in addition to the five (5) years.

Interpersonal Skills

Motivating or influencing others is a material part of the job. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others. The role requires a significant level of trust or diplomacy.

Other Skills

The person holding this position is required to have complete knowledge of Credit Union policies and procedures; knowledge of managerial skills; knowledge of credit union accounting; the ability to accurately balance credit union transactions; to organize work; mental alertness; neatness in appearance; punctuality; dependability; and a cooperative attitude in relations with members and other employees.

