



**USC** University of  
Southern California

## Credit Union Operations Manager Job Description

### JOB INFORMATION

Job Code:	115047
Job Title:	Credit Union Operations Manager
FLSA Status:	Exempt
Supervisory:	Supervises employees who do not supervise.
Job Family:	Credit Union
Job Family Group:	Accounting, Finance and Banking
Management Level:	5 Manager

### 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 of volume and other activities. 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 utmost care.

### JOB QUALIFICATIONS:

#### Education

Req	Pref	Degree	Field of Study
X		High school or equivalent	
	X	Bachelor's degree	

#### Additional Education

**Check here if experience may substitute for some of the above education.**

☐ Combined experience/education as substitute for minimum education

#### Work Experience

Req	Pref	Work Experience	Experience Level
X		3 years	

#### Additional Work Experience

**Check here if education may substitute for some of the above work experience.**

☐ Combined experience/education as substitute for minimum work experience

#### Knowledge, Skills and Abilities

Req	Pref	Functional Skills
X		Management-level experience in credit union operations, in an institution of similar asset size.

#### Other Job Factors

## JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
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.				

## Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	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.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: <a href="https://policy.usc.edu/mandated-reporters/">https://policy.usc.edu/mandated-reporters/</a>

<i>Campus Security Authority (CSA)</i>	<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: <a href="https://dps.usc.edu/alerts/clery/">https://dps.usc.edu/alerts/clery/</a>	No

## ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

\_\_\_\_\_  
Print Employee Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Manager Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.