



## Member Relationship Specialist I, Credit Union Job Description

### JOB INFORMATION

|                          |   |
|--------------------------|---|
| <i>Job Code:</i>         | 115020  |
| <i>Job Title:</i>        | Member Relationship Specialist I, Credit Union          |
| <i>FLSA Status:</i>      | Non-Exempt  |
| <i>Supervisory:</i>      | May oversee student, temporary and/or resource workers. |
| <i>Job Family:</i>       | Credit Union  |
| <i>Job Family Group:</i> | Accounting, Finance and Banking                         |
| <i>Management Level:</i> | 7 Individual Contributor                                |

### JOB SUMMARY

Processes member transactions, performs account maintenance, and recommends appropriate products and services. Assists members in submitting applications. Supports achievement of department goals and deepens member relationships by providing outstanding member experiences.

### JOB QUALIFICATIONS:

#### Education

| <i>Req</i> | <i>Pref</i> | <i>Degree</i>             | <i>Field of Study</i> |
|------------|-------------|---------------------------|-----------------------|
| X          |             | High school or equivalent |                       |
|            | X           | Associate's degree        | in related field(s)   |

#### Additional Education

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

☐ Combined experience/education as substitute for minimum education

#### Work Experience

| <i>Req</i> | <i>Pref</i> | <i>Work Experience</i> | <i>Experience Level</i>   |
|------------|-------------|------------------------|---|
| X          |             | <1 year                |   |
| X          |             |                        | Six months of customer service, sales or retail banking experience. |
|            | X           | 1 year                 |   |
|            | X           | 1 year                 | of customer service, sales or retail banking experience.            |

#### 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

| <i>Req</i> | <i>Pref</i> | <i>Functional Skills</i>  |
|------------|-------------|---|
| X          |             | Excellent interpersonal, written and oral communication skills.                   |
| X          |             | Ability to work independently with minimal supervision and as a member of a team. |

## Knowledge, Skills and Abilities

| Req | Pref | Functional Skills   |
|-----|------|---|
| X   |      | Ability to multi-task and build relationships in sales environment.                           |
| X   |      | Experience with office management software/tools (e.g. Google suite, Slack, Microsoft Excel). |
|     | X    | Working knowledge of consumer loan products and all services.                                 |

## Other Job Factors

## JOB ACCOUNTABILITIES

|   | % Time | Essential | Marginal | N/A |
|---|--------|-----------|----------|-----|
| Processes member transactions (e.g., deposit/withdrawal transactions, loan payments, cash advances, cashier's checks) efficiently, accurately, and in a timely manner. Maintains control over daily cash drawers and/or cash machines. Balances vault and processes vault transactions, mutilated currency, and cash order requests. Assists members in submitting domestic and international wire requests. Performs end of day operational tasks and balances negotiable instruments. Responsible for implementing Know Your Member (KYM) and conducting due diligence when interacting with members. |        |           |          |     |
| Performs member account maintenance. Issues and captures debit cards, performs online banking support, and provides copies of statements/checks as needed. Processes travel notifications, account update forms, and closed account forms. Conducts research and provides solutions to member requests.   |        |           |          |     |
| Complies with bank operations and security procedures by participating in dual control functions. Contributes to monthly audits.  |        |           |          |     |
| Assists members with submitting applications for membership and additional deposit products. Assists members with submitting loan applications. Describes application review process and discusses key aspects of financing (e.g., rates, terms, payment amounts).  |        |           |          |     |
| Identifies and refers new account products and services to members. Provides information on ancillary products including insurance and investment services.   |        |           |          |     |
| Completes all required training to maintain compliance with all job-related applicable laws, regulatory requirements, and procedures. Promotes an environment that fosters inclusive relationships and creates unbiased opportunities for contributions through ideas, words, and actions that uphold principles of the USC Code of Ethics.   |        |           |          |     |

## Other Requirements

| Essential:   | Emergency Response/Recovery  | Essential: | Mandated Reporter   |
|--|--|------------|---|
| Yes  | 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> |
| Campus Security Authority (CSA)  |  |            | Essential:  |
| 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.