UNIVERSITY OF SOUTHERN CALIFORNIA

Credit Union Member Service Supervisor

Job Code: 115023

OT Eligible: **No**

Comp Approval: **6/10/2019**

JOB SUMMARY:

Supervises credit union operations and staff in designated member-service departments. Opens new member accounts and loans, provides resolutions to member inquiries, and performs other relevant tasks and procedures to best meet member experience and operational goals.

JOB ACCOUNTABILITIES:

*E/M/NA	% TIME	
_____	_____	Supervises and coaches assigned staff to ensure service standards are met. Assigns, prioritizes, and schedules work, assesses performance, and provides regular feedback. Ensures policies, procedures, and guidelines are followed in all areas of assigned responsibility. Participates in all assigned professional development programs in support of the credit union's commitment to increases sales, service, quality, and teamwork.
_____	_____	Develops sales and service strategies alongside department manager. Recommends operational and marketing strategies to achieve department goals. Works on special projects aimed at improving member experiences, and achieving department and organization goals.
_____	_____	Interviews and counsels loan applicants. Describes and discusses the application review process, insurance programs, and key financing aspects (e.g., rates, terms, payment amounts), and provides recommendations. Collects and verifies appropriate loan transaction documentation – income verification, vehicle registration, credit reports, account statements, etc.
_____	_____	Reviews, analyzes, and recommends the disposition of membership and loan applications. Approves applications within pre-determined parameters, processes and funds loans, and ensures all required documentation is properly signed and received. Explains debt responsibilities (e.g., due date, late charges, payment obligations) to members.
_____	_____	Handles member inquiries via various channels, researching problems and providing resolutions. Investigates and resolves escalated member issues (e.g., loan adjustments, fee reversals), and documents follow-ups to members, when necessary.
		Performs other related duties as assigned or requested. The university reserves the right to add or change duties at any time.

***Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.**

EMERGENCY RESPONSE/RECOVERY:

Essential: ☐ No

☐ 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.

JOB QUALIFICATIONS:

Minimum Education:

High school or equivalent

Minimum Experience:

5 years

Minimum Field of Expertise:

Five years' experience at a financial institution, interpreting and applying pertinent policies, procedures, regulations, and requirements. Knowledge of credit union service standards and loan operations, as well as all relevant local, state, and federal regulations governing financial institutions. Experience in a management or leadership role. Written and oral communication skills, able to provide both detailed information and summaries to relevant stakeholders.

Preferred Education:

Bachelor's degree

Preferred Field of Expertise:

Experience in a management role at a financial institution. Knowledge of human resources processes, and experience interviewing, mediating, and teaching/training staff. Written and oral fluency in Spanish and/or other foreign languages. Experience with social media and multi-platform communications and marketing plans.

Supervises: Level:

Supervises employees who do not supervise.

SIGNATURES:

Employee: _____ **Date:**_____

Supervisor: _____ **Date:**_____

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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