

# JOB POSTING

<b>Position Title:</b>	<b>Branch Leader, 15-18 months</b>
<b>Department:</b>	Leadership - Member Experience
<b>No. of roles posted:</b>	One
<b>Reports to:</b>	Chief Experience Officer
<b>Location:</b>	Oshawa & Bowmanville

## JOB DESCRIPTION

The Branch Leader is responsible for providing leadership to both Bowmanville and Oshawa Member Experience teams, including the Call Centre, to create a superior member and employee experience.

This position will provide leadership to the team and support the growth and development of each individual on the team through coaching. The Branch Manager will provide input, develop and execute action plans to support the achievement of business goals and strategy, along with ensuring the highest quality member service and ensuring a high standard of compliance to internal controls and procedures.

## ROLE ACCOUNTABILITY

### Employee Engagement

- Lead, coach and develop staff to create a positive employee experience and build individual and team capability. Motivate and coach the team to achieve their performance goals and support the credit union's objectives, ensuring recognition of accomplishments. Encourage and empower staff participation in decision-making and innovation. Ensure individual development plans are in place and provide one-on-one employee coaching and support.
- Monitor team activities and work to ensure adherence to policies, procedures, completeness and accuracy. Ensure that the team is cross-trained to provide position coverage during vacations and staff absences. Analyze processes and identify opportunities to increase efficiency and streamline work.

### Member Engagement

- Ensure consistent delivery of high quality service in the Branch in order to meet or exceed member expectations. Plan and schedule employees appropriately to optimize service levels. Conduct interactive product and service learning sessions in order to build employee capability. Monitor member traffic and ensure staff is allocated to meet service standards and minimize wait times.
- Be visible and interactive with members during high traffic periods. Ensure that member inquiries and concerns are responded to in a timely, effective and efficient manner in accordance with policies, procedures and standards. Identify reoccurring concerns and key issues expressed by members and staff. Recommend, develop and implement action plans to correct problems.

### Grow the Business

- Lead in the development and attainment of all Branch and Call Centre targets.
- Develop and implement Branch and Call Centre strategies, goals, objectives and overall Branch and Call Centre efficiencies.
- Coach employees to develop and implement a proactive data-mining member call program to deepen the relationships with our members.
- Work collaboratively with peers by sharing best practices and learning opportunities.
- Liaise with third parties to ensure a seamless member experience.

Oshawa Branch  
 322 King Street West  
 Oshawa, ON L1H 7L1  
 F | 905.728.8727

Bowmanville Branch  
 221 King Street East  
 Bowmanville, ON L1C 1P7  
 F | 905.623.4821

T | 905.728.5187  
 TF | 1.800.268.8771

- Develop the Branch and Call Centre budget through effectively understanding the data in all areas of the location.

### **Community Engagement**

- Represent the credit union to enhance its image with the public, community, and business community through interaction, presentations, functions and events.
- Act as an ambassador within the community in support of Pathwise Credit Union’s objectives.

### **General Responsibilities**

- Initiate action to improve growth and development of the Branch and Call Centre deposit and loan portfolios. Pursue new business by establishing and maintaining liaison with business and community contacts. Monitors all Branch activities to ensure awareness of operational problems and successes.
- Assist with reviewing and approving lending applications.
- Accountability for deposits, credit cards, other income streams and referrals, along with estates.
- Assist, at both Pathwise Branches, in resolving any issues that may be required to ensure the ATM is working at all times with little interruption of service to the public.
- Answer and respond to any alarm issues received from Chubb Security.
- Participate as a member of the management team in the strategic and business planning process. Identify and recommend short and long-term goals and objectives for the Branches, including contribute to the design and development of plans and ensure goals, plans and programs are effectively communicated to staff.
- Ensure risk management policies, procedures and controls are being observed, i.e. loss prevention, authorization letters, money laundering, client confidentiality, emergency procedures and warning signs of compliance breakdown. Ensure the Code of Conduct is understood and followed. Ensure regulatory training is completed by staff as required and applied consistently.
- Monitor the performance of probationary staff and current staff in “training” role and take corrective actions, as necessary. Effectively manage staff in accordance with human resources policies, procedures, standards, practices and the collective agreement.
- Call Center Administration.
- Act as the Backup ATM & CRU.
- May include Privacy Officer and/or Complaints Officer responsibilities.

### **KNOWLEDGE, SKILLS AND ABILITIES**

- Demonstrated leadership capability through developing and maintaining high levels of staff enthusiasm, teamwork, motivation and commitment.
- Strong people management skills and experience performing recruitment activities, developing employee capability, managing performance, coaching, applying and explaining human resource policies, procedures, standards and collective agreement terms and conditions.
- Demonstrated interpersonal skills to establish and maintain good relationships with employees, employee representatives and the management team. Able to interact effectively with members.
- Demonstrates a continued commitment to personal development and continuous learning.
- Knowledge of credit union vision and values and branch operations.
- Strong knowledge of credit union products and services, including cash and negotiable instrument controls.
- Effective time management skills in order to plan, prioritize and organize work of others and self.

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- Highly developed communication and interpersonal skills to effectively interact with employees, members, management team, etc.
- Effective problems solving skills i.e. information gathering, analysis, root cause identification and selecting the most appropriate solution for implementation.
- Strong computer literacy in windows environment, particularly word and excel.
- Effective and professional communication is required in both written and verbal forms. Tact and discretion are required to resolve problems, conflicts or misunderstandings.

### **Education and Experience**

- Minimum education is a secondary school graduation diploma or equivalent.
- Minimum of five (5) years in the Credit Union system.
- Call Centre experience managing call structure and regulations, an asset.
- Completion of designated CAMLO Training Courses and maintaining current on legislation.
- Minimum of three (3) years lending experience and accredited Lending courses.

### **APPLICATIONS**

Candidates should submit their application, cover letter and resume to:

Attn: People and Culture  
E-mail: [careers@pathwise.ca](mailto:careers@pathwise.ca)

### **ACCOMMODATION**

In accordance with the Ontario Human Rights Code, Accessibility for Ontarians with Disabilities Act, 2005, accommodation will be provided in all parts of the hiring process. Applicants need to make their needs known in advance by contacting us at [Careers@pathwise.ca](mailto:Careers@pathwise.ca), subject line “accommodation”.