

HEY Credit Union

Job Description – September 2021

Post Title: Branch Development Assistant (N E Lincolnshire) (Post CU41)

Reports to: Branch Development Co-ordinator, while working closely with Branch Development Officer

Hours: 4 days per week (normally Tue-Fri)

Purpose: To ensure that members and customers needs are dealt with in a timely and efficient manner. To maintain good relations with members, customers and colleagues to project the correct image for the Credit union and help the branch to grow its business.

Duties and Responsibilities:

- 1 To be in attendance at the Credit Union Branch Office during the hours specified to:
 - provide information about Credit Union services and enrol new members;
 - take deposits, issue withdrawals and ensure cash is properly balanced and accounted for;
 - attend to telephone calls, e-mails, correspondence and members visiting in person;
 - receive loan applications and enter them on the loan processing system;
 - issue approved loans to members in accordance with the procedure laid down;
 - follow up any loans declined to ensure a good experience for applicants.
- 2 To assist with processing transactions, entering new members on the system, updating, scanning and filing records as required.
- 3 To maintain a safe, tidy, well-presented Branch Office at all times and ensure that displays are refreshed and stationery stocks replenished promptly and remain compliant.
- 4 To assist with projects or activities to support the Branch Development Team such as collating product and member data, identifying arrears and inactive accounts, and helping to organise branch promotional events and community activities.
- 5 To work closely, in a team environment, with staff colleagues and volunteers, help support new colleagues as necessary, and participate in training activities as required.
- 6 Other duties of a similar nature as required.

Measures of success;

- Members are satisfied with the standards of customer care at the Branch.
- Applications and transactions are processed accurately and within specified timescales.
- Members and prospective members receive accurate and relevant information.
- Effective team work with colleagues and contribution to the success of HEY Credit Union.
- Branch is safe and presentable at all times and growing its business

The Health and Safety at Work Act 1974 and other associated legislation places responsibilities for Health and Safety on all employees. Therefore it is the post holder's responsibility to take reasonable care for the health, safety and welfare of him/herself and other employees in accordance with legislation and the Credit Union's Safety Policy and Programme. Specific details are outlined in the Credit Union's Health and Safety Policy.

Approved by Personnel & Training Committee 2021