

HEY Credit Union

Job Description – September 2021

Post Title: Branch Development Officer (N E Lincolnshire) (Post CU40)

Reports to: Branch Development Co-ordinator

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

Purpose: To lead operations in North East Lincolnshire, helping the branch team to engage with members and the community, grow its business and become sustainable. To support other business development projects and activities. To maintain good relations with members, customers and colleagues to project the correct image for HEY Credit Union.

Duties and Responsibilities:

- 1 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 and issue withdrawals, process transactions within agreed limits, enter new members on the system, update, scan and file records as required;
 - Attend to telephone calls, e-mails, online enquiries, correspondence and members visiting;
 - Check, assess, process and underwrite loan applications through the LACE system in strict accordance with the current Lending Policy and Procedures; and
 - Assist members whose loans are approved with the issue process, in accordance with the agreed procedure, and pass completed documentation to the Payments Section;
- 2 Balance the branch cash float, ensure cash is kept safely and any surplus income is banked accurately and promptly in accordance with agreed branch cash procedures.
- 3 Administer the Branch Office effectively by:
 - Ensuring it is tidy and well-presented at all times;
 - Keeping displays and marketing resources fresh and up to date;
 - Replenishing stationery stocks promptly and keeping them compliant; and
 - Reporting any problems with the premises to Management and/or the landlord as appropriate.
- 4 Assist the Credit Controller to identify and monitor loans that go into arrears.
- 5 Make links with the local community and help to promote Credit Union membership and services by, for example, organising occasional in-branch events and social media activity.
- 6 Conduct regular follow-up activity to:
 - Welcome and support new members to become active; and
 - Encourage established and lapsed members to make the most of their membership.
- 7 Encourage and support any outreach activities of HEY Credit Union in North East Lincolnshire such as community access points, employer based payroll partnerships, schools and colleges and help to find new payroll partners.
- 8 Work closely, in a team environment, with colleagues at HEY Credit Union Central Office and other branches and volunteers working in the community, help to support new colleagues as necessary, and participate in team training as required.
- 9 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.
- Branch is well-run and presentable at all times.

- Branch business grows and product take-up by members increases as a result of specific activities.
- Effective team work with colleagues and contribution to the success of HEY Credit Union.

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 HEY Credit Union's Safety Policy. Specific details are outlined in HEY Credit Union's Staff Handbook.

Approved by Personnel & Training Committee – 2021