

**Community Resource Credit Union**  
**Structured Compensation - Job Description**  
**Team Leader**

Data Year: 2018

Prepared On: 09/24/2018

---

Department:	Retail Delivery	Grade:	7
Reports To:	Teller Manager	Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	Tellers, MSRs
Approved By:	SVP, COO	Effective Date:	01/01/2010
		Revised Date:	07/10/2018

**Role:**

To assist members with their financial transactions, involving paying and receiving cash and other negotiable instruments. Actively sells credit union products and services to ensure predetermined organizational goal are met. Adheres to company policies and procedures and standard practices. Adheres to Federal and State Laws and Regulations. Actively coaches tellers to performace.

**Essential Functions & Responsibilities:**

- E 45% Receives and processes member financial transactions, including deposits, withdrawals, and loan payments; sells money orders and travelers checks to members; transfers amounts from member accounts as directed.
- E 10% Adheres to internal control, security & safety procedures.
- E 10% Trains and monitors the work of other tellers; coordinates teller activities. Assists tellers with questionable member transactions and balancing of cash drawers.
- E 10% Balances cash drawer and daily transactions.
- E 5% Assists Teller Manager in daily operations, including but not limited to, CDMS, ATM, Night Deposit Transactions and Fed Cash Shipments.
- E 5% Balances Visa, MasterCard, and Money Order sales to general ledger.
- E 5% Welcomes members and provides routine information concerning services and directs members to appropriate departments for specific information and services.
- N 5% Performs a variety of miscellaneous tasks including typing, filing, computer input and answering the telephone.
- N 5% Performs other related duties as assigned.

**Performance Measurements:**

1. Maintains a high skill level among tellers.
2. Provides friendly, professional, personal service to all members.
3. Balances daily in compliance with Teller Balancing Standards
4. Handles at least 150 transactions per day.
5. Balances with a maximum of one posting error per month.
6. Requires some analysis or research to determine the best solution for a limited number of transactions.

**Community Resource Credit Union**  
**Structured Compensation - Job Description**  
**Team Leader**

Data Year: 2018

Prepared On: 09/24/2018

---

7. Gathers information from various sources, comparing and weighing information to make logical decisions.
8. Ensures tellers provide friendly, professional, personal service to all members.
9. Schedules tellers to meet member demands at peak times, at a minimal cost.
10. Displays a positive attitude and professional work performance.
11. Makes rational and realistic decisions in regards to check holds and CRCU Procedures.
12. Demonstrates an understanding of, and follow the requirements of all regulation compliance, including but not limited to those of Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Office of Foreign Assets Control (OFAC), Customer Identification Program (CIP) and Member Due Diligence (MDD) as it specifically relates to their job functions. Employee shall be trained annually in BSA/AML compliance.

**Knowledge and Skills:**

Experience	One year of similar or related experience. Leadership experience preferred.
Education	A high school education or GED.
Interpersonal Skills	Courtesy, tact, and diplomacy are essential elements of the job. Work involves much personal contact with others inside and/or outside the organization for purposes of giving or obtaining information, building relationships, or soliciting cooperation.
Other Skills	Must have good communication skills for training other tellers. Proficient computers skills and 10 key. Accurate with numbers and names.
Physical Requirements	While performing the duties of this job, the employee is regularly required to use hands or fingers, handle or feel; reach with hands and arms; talk and hear. The employee frequently is required to stand, walk, and sit. Specific vision abilities required of this job include close vision and ability to adjust focus.
Work Environment	Work is performed indoors with some potential for exposure to safety and health hazards related to electronics work. May require periodic travel. There is exposure to potential hazardous conditions such as robbery. Employees are to receive detailed instructions and procedures to follow in order to minimize risk.  In accordance with the American with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.  Job descriptions are not intended and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

**This Job Description is not a complete statement of all duties and responsibilities comprising the position.**

**Community Resource Credit Union**  
Structured Compensation - Job Description  
**Team Leader**

Data Year: 2018

Prepared On: 09/24/2018

---

---

Printed Employee Name

---

Date

---

Employee Signature