

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  | <b>Job Family:</b> Banking - Professional |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |                                           |  |
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| <b>Job Title:</b> Loan Administrator II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  | <b>Job Title:</b>                         |  |
| <b>Job Code:</b> F0656P                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  | <b>Job Code:</b>                          |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  | <b>Grade Level:</b> <b>Exemption:</b>     |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  | <b>Effective/Revision Date:</b>           |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  | <b>Job Summary</b>                        |  |
| Independently, administer portfolio strategy focused on program growth, profitability and member acquisition. Serve as principal technical advisor for consumer and mortgage loan processing systems.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |  |                                           |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  | <b>Core Duties</b>                        |  |
| <ul style="list-style-type: none"> <li>• Administer loan processing and loan processing systems; provide guidance to team members on complex or unusual loans and transactions</li> <li>• Review underwriter approvals, maintaining loan quality and providing expertise and training to team members</li> <li>• Perform portfolio analysis which may include: account reviews, re-pricing, profitability and risk analysis</li> <li>• Develop, communicate and achieve branch and individual sales plans, goals and objectives to increase the member base and develop multiple member relationships by actively participating in and managing branch sales efforts</li> <li>• Act as vendor contact with third party processing and servicing providers</li> <li>• Liaison with Harvard's financial aid officials related to student loan program development and management; develop targeted communication and training with University financial aid officers</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |                                           |  |

| <b>Basic Qualifications</b>                                                                                                                                                                                                                                             | <b>Basic Qualifications</b>                 | <b>Basic Qualifications</b>                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|---------------------------------------------|
| <ul style="list-style-type: none"><li>• Bachelor's degree or equivalent work experience required</li><li>• Minimum of 3 year's relevant work experience</li></ul>                                                                                                       |                                             |                                             |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                             | <b>Additional Qualifications and Skills</b> | <b>Additional Qualifications and Skills</b> |
| <ul style="list-style-type: none"><li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li><li>• Working knowledge of basic financial administration principles</li><li>• Demonstrated experience with financial systems and data query tools</li></ul> |                                             |                                             |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                        | <b>Certificates and Licenses</b>            | <b>Certificates and Licenses</b>            |
|                                                                                                                                                                                                                                                                         |                                             |                                             |
| <b>Physical Requirements</b>                                                                                                                                                                                                                                            | <b>Physical Requirements</b>                | <b>Physical Requirements</b>                |
|                                                                                                                                                                                                                                                                         |                                             |                                             |
| <b>Working Conditions</b>                                                                                                                                                                                                                                               | <b>Working Conditions</b>                   | <b>Working Conditions</b>                   |
| <ul style="list-style-type: none"><li>• Work is performed in an office setting</li></ul>                                                                                                                                                                                |                                             |                                             |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |  | <b>Job Family:</b> Banking - Professional                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
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| <b>Job Title:</b> Card Services Administrator II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |  | <b>Job Title:</b> Card Services Administrator III                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  |
| <b>Job Code:</b> F0756P                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | <b>Job Code:</b> F0757P                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  | <b>Grade Level:</b> 57 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |  | <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  | <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
| Responsible for maximizing the collection and/or recovery of credit union assets from delinquent and charged-off accounts.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  | Independently implement and monitor all credit card products with a focus on: growth of card balances & transactions, card utilization, risk management, and profitability.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  | <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
| <ul style="list-style-type: none"> <li>• Analyze the financial situation of delinquent borrowers; contact delinquent accounts and take appropriate action to bring accounts current</li> <li>• Approve, deny or modify collection recommendations</li> <li>• Repossess collateral when necessary; arrange for sale of repossessed collateral and determine additional investments in collateral</li> <li>• Develop recommendations for cost efficiencies and enhancements to products, pricing and processes</li> <li>• Prepare varied reports on credit card trends and activity</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  | <ul style="list-style-type: none"> <li>• Review the processing of all credit cards and ensure compliance with policies and processing standards</li> <li>• Perform complex portfolio analysis including; account reviews, re-pricing, profitability, and risk analysis by product line and combined portfolio</li> <li>• Perform market research and portfolio analytics to ensure all credit card products retain the appropriate value proposition and reward programs as well oversee initiatives to generate new member enrollment and program utilization</li> <li>• Develop new products and promotional activities to achieve business plan sales and revenue goals</li> <li>• Oversee vendor relationships with third party credit card and processing servicing providers</li> <li>• Provide regular reporting to management on credit card trends, portfolio growth, activity, profitability and risk</li> <li>• Provide technical advice and problem resolution for credit card systems, products and services</li> <li>• Provide resources and training in support of the credit card function</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |

| Basic Qualifications                                                                                                                                                                                                                                                  | Basic Qualifications                                                                                                                                                                                                                                                  | Basic Qualifications                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 3 year's relevant work experience</li> </ul>                                                                                                      | <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 5 year's relevant work experience</li> </ul>                                                                                                      |                                      |
| Additional Qualifications and Skills                                                                                                                                                                                                                                  | Additional Qualifications and Skills                                                                                                                                                                                                                                  | Additional Qualifications and Skills |
| <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul> | <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul> |                                      |
| Certificates and Licenses                                                                                                                                                                                                                                             | Certificates and Licenses                                                                                                                                                                                                                                             | Certificates and Licenses            |
|                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                       |                                      |
| Physical Requirements                                                                                                                                                                                                                                                 | Physical Requirements                                                                                                                                                                                                                                                 | Physical Requirements                |
|                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                       |                                      |
| Working Conditions                                                                                                                                                                                                                                                    | Working Conditions                                                                                                                                                                                                                                                    | Working Conditions                   |
| <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                              | <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                              |                                      |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                              | <b>Job Family:</b> Banking - Management      |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                              |                                              |  |
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| <b>Job Title:</b> Banking Mgt I                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Job Title:</b>                            | <b>Job Title:</b>                            |  |
| <b>Job Code:</b> F0555M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Job Code:</b>                             | <b>Job Code:</b>                             |  |
| <b>Grade Level:</b> 55 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Grade Level:</b> <b>Exemption:</b> Exempt | <b>Grade Level:</b> <b>Exemption:</b> Exempt |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Effective/Revision Date:</b>              | <b>Effective/Revision Date:</b>              |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                              | <b>Job Summary</b>                           |  |
| Administer banking operations at a branch. Serve as the primary point of contact for customers, provide high quality service and promote sales of products and services.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                              |                                              |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                              | <b>Core Duties</b>                           |  |
| <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Administer branch operations including customer service, branch balancing, physical appearance and security</li> <li>• Develop memberships and new business in deposits, consumer loans and residential mortgages; promote products and services to customers and retain accounts</li> <li>• Measure and evaluate branch performance and recommend operational improvements, changes in facilities, staffing, etc. to meet customer needs and improve productivity</li> <li>• May provide training to clients and staff</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |                                              |                                              |  |

| <b>Basic Qualifications</b>                                                                                                                                                                                                                                                                              | <b>Basic Qualifications</b>                 | <b>Basic Qualifications</b>                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|---------------------------------------------|
| <ul style="list-style-type: none"><li>• Bachelor's degree or equivalent work experience required</li><li>• Minimum of 1 year relevant work experience</li></ul>                                                                                                                                          |                                             |                                             |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                                              | <b>Additional Qualifications and Skills</b> | <b>Additional Qualifications and Skills</b> |
| <ul style="list-style-type: none"><li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li><li>• Working knowledge of basic financial administration principles</li><li>• Demonstrated experience with financial systems and data query tools</li><li>• Supervisory Experience</li></ul> |                                             |                                             |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                                                         | <b>Certificates and Licenses</b>            | <b>Certificates and Licenses</b>            |
|                                                                                                                                                                                                                                                                                                          |                                             |                                             |
| <b>Physical Requirements</b>                                                                                                                                                                                                                                                                             | <b>Physical Requirements</b>                | <b>Physical Requirements</b>                |
| <ul style="list-style-type: none"><li>• Ability to exert up to 35 pounds of lifting force occasionally</li></ul>                                                                                                                                                                                         |                                             |                                             |
| <b>Working Conditions</b>                                                                                                                                                                                                                                                                                | <b>Working Conditions</b>                   | <b>Working Conditions</b>                   |
| <ul style="list-style-type: none"><li>• Work is performed in an office setting</li></ul>                                                                                                                                                                                                                 |                                             |                                             |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Job Family:</b> Banking - Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| <b>Job Title:</b> Banking Mgt II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | <b>Job Title:</b> Banking Mgt IV                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |
| <b>Job Code:</b> F0556M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  | <b>Job Code:</b> F0558M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  | <b>Grade Level:</b> 58 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Manage the operations, sales and service provided at a branch. Serve as the primary point of contact for customers, provide high quality service, develop efficient operations and promote sales of products and services.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  | Manage banking operations, sales and services provided at multiple branch locations. Oversee consumer and mortgage lending services as well as saving products. Provide leadership to branch staff.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |
| <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Manage operations of branch including customer service, branch balancing, physical appearance and security; ensure adequate personnel coverage for branch location; identify opportunities to streamline and improve processes and recommend changes in facilities, staffing levels, and branch hours</li> <li>• Develop, communicate and achieve individual sales plans to increase member base</li> <li>• Assist in developing retail products and services including vendor selection, writing policies and procedures and product changes</li> <li>• Hold loan signing authority and act within established approval guidelines</li> <li>• Responsible for IRA plan management, including annual reporting requirements and mandatory distributions</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  | <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Oversee and manage operations for multiple branches; measure and evaluate branch performance and recommend operational improvements, changes in facilities, staffing, etc. to meet customer needs and improve productivity</li> <li>• Oversee security and physical appearance of the branches; develop and implement procedures to guarantee security and proper auditing of branches and tellers</li> <li>• Develop, communicate and achieve individual sales plans to increase member base</li> <li>• Collaborate with management regarding retail products and services including vendor selection, writing policies and procedures and product changes</li> <li>• Hold loan signing authority and act within established approval guidelines</li> <li>• Responsible for IRA plan management, including annual reporting requirements and mandatory distributions</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul>                                                           |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  | <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Direct the activities of all branch offices and provide oversight to ensure that branches are operational and members are being served</li> <li>• Manage processing systems and implement solutions, new technology and system enhancements and procedures to improve productivity, accuracy, control and throughput of transaction processing; ensure system compliance with product attributes, rate changes, fee schedules and applicable policy</li> <li>• Ensure the safeguarding of assets, personnel and facilities as the Security Officer; develop and manage alarms, systems and procedures to mitigate fraud and larceny</li> <li>• Oversee compliance and hold loan signing authority</li> <li>• Collaborate with management to achieve credit union wide business plan objectives and advises on credit union strategic planning</li> <li>• Serve as the principal source of information for products and services</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |

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| <b>Basic Qualifications</b>                                                                                                                                                                                                                                                                                   | <b>Basic Qualifications</b>                                                                                                                                                                                                                                                 | <b>Basic Qualifications</b>                                                                                                                                                                                                                                                 |
| <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 year's relevant work experience</li> </ul>                                                                                                                                          | <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 7 year's relevant work experience</li> <li>• Supervisory Experience</li> </ul>                                                                      | <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 10 year's relevant work experience</li> <li>• Supervisory Experience</li> </ul>                                                                     |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                                                   | <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                 | <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                 |
| <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory Experience</li> </ul> | <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul> | <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul> |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                                                              | <b>Certificates and Licenses</b>                                                                                                                                                                                                                                            | <b>Certificates and Licenses</b>                                                                                                                                                                                                                                            |
|                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                             |
| <b>Physical Requirements</b>                                                                                                                                                                                                                                                                                  | <b>Physical Requirements</b>                                                                                                                                                                                                                                                | <b>Physical Requirements</b>                                                                                                                                                                                                                                                |
| <ul style="list-style-type: none"> <li>• Ability to exert up to 35 pounds of lifting force occasionally</li> </ul>                                                                                                                                                                                            | <ul style="list-style-type: none"> <li>• Ability to exert up to 35 pounds of lifting force occasionally</li> </ul>                                                                                                                                                          | <ul style="list-style-type: none"> <li>• Ability to exert up to 35 pounds of lifting force occasionally</li> </ul>                                                                                                                                                          |
| <b>Working Conditions</b>                                                                                                                                                                                                                                                                                     | <b>Working Conditions</b>                                                                                                                                                                                                                                                   | <b>Working Conditions</b>                                                                                                                                                                                                                                                   |
| <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                  |



## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  | <b>Job Family:</b> Banking - Management      |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  |                                              |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |                                              |  |
| <b>Job Title:</b> Contact Center Mgt II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  | <b>Job Title:</b>                            |  |
| <b>Job Code:</b> F2056M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  | <b>Job Code:</b>                             |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  | <b>Grade Level:</b> <b>Exemption:</b> Exempt |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  | <b>Effective/Revision Date:</b>              |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  | <b>Job Summary</b>                           |  |
| Responsible for the efficient and effective management of the Contact Center. Ensure all Credit Union members receive quality service, courteous treatment and accurate information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |                                              |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  | <b>Core Duties</b>                           |  |
| <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Manage the contact center, ensuring proper staffing, customer service and adherence to Credit Union policies</li> <li>• Review contact center performance and implement improvements to ensure quality control</li> <li>• Review policies and procedures, recommend improvements</li> <li>• Serve as the principal source of information on contact center policies and procedures; provide guidance to staff</li> <li>• Assist with the preparation and administration of center budget</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |                                              |  |

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| <b>Basic Qualifications</b>                                                                                                                                                                                                                                                                                   | <b>Basic Qualifications</b>                 | <b>Basic Qualifications</b>                 |
| <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 year's relevant work experience</li> </ul>                                                                                                                                          |                                             |                                             |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                                                   | <b>Additional Qualifications and Skills</b> | <b>Additional Qualifications and Skills</b> |
| <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory Experience</li> </ul> |                                             |                                             |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                                                              | <b>Certificates and Licenses</b>            | <b>Certificates and Licenses</b>            |
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| <b>Physical Requirements</b>                                                                                                                                                                                                                                                                                  | <b>Physical Requirements</b>                | <b>Physical Requirements</b>                |
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| <b>Working Conditions</b>                                                                                                                                                                                                                                                                                     | <b>Working Conditions</b>                   | <b>Working Conditions</b>                   |
| <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                                                    |                                             |                                             |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Job Family:</b> Banking - Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |
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| <b>Job Title:</b> Card Services Mgt II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  | <b>Job Title:</b> Card Services Mgt III                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |
| <b>Job Code:</b> F0756M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  | <b>Job Code:</b> F0757M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  | <b>Grade Level:</b> 57 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| Oversee card services including production, delivery, and functionality of debit, ATM, and credit cards. Assist with developing new products, services and procedures                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |  | Manage all aspects of card services operations and functionality. Responsible for evaluating processes and recommending improvements in accordance with established credit union policies and procedures.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  | <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Manage the ordering, production and delivery of access cards (ATM, debit, credit), issue PINs, purge inactive cards and maintain inventory and assist in developing systems and methods to improve card services</li> <li>• Oversee processing of charge backs and disputed activity; authorize charge offs and provide monthly reports of losses</li> <li>• Serve as primary contact with service providers</li> <li>• Monitor daily operational credit card reports and resolve issues including finance charges and late fees</li> <li>• Provide training and access to card systems</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  | <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Manage card services operations including access card administration and functionality, inventory and PINs</li> <li>• Evaluate card services procedures and systems, recommend improvements</li> <li>• Manage the processing of charge backs and disputed activity; authorize charge offs and provide monthly reports of losses</li> <li>• Provide technical expertise, problem-resolution and training related to card services operations</li> <li>• Oversee card services reporting and resolve complex issues and problems</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |

| Basic Qualifications                                                                                                                                                                                                                                                                                  | Basic Qualifications                                                                                                                                                                                                                                                                                  | Basic Qualifications                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 3 year's relevant work experience</li> </ul>                                                                                                                                      | <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 5 year's relevant work experience</li> </ul>                                                                                                                                      |                                      |
| Additional Qualifications and Skills                                                                                                                                                                                                                                                                  | Additional Qualifications and Skills                                                                                                                                                                                                                                                                  | Additional Qualifications and Skills |
| <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> <li>Supervisory Experience</li> </ul> | <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> <li>Supervisory Experience</li> </ul> |                                      |
| Certificates and Licenses                                                                                                                                                                                                                                                                             | Certificates and Licenses                                                                                                                                                                                                                                                                             | Certificates and Licenses            |
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| Physical Requirements                                                                                                                                                                                                                                                                                 | Physical Requirements                                                                                                                                                                                                                                                                                 | Physical Requirements                |
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| Working Conditions                                                                                                                                                                                                                                                                                    | Working Conditions                                                                                                                                                                                                                                                                                    | Working Conditions                   |
| <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                                                              |                                      |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  | <b>Job Family:</b> Banking - Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
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| <b>Job Title:</b> Loan Services Mgt II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | <b>Job Title:</b> Loan Services Mgt VI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
| <b>Job Code:</b> F0656M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  | <b>Job Code:</b> F0660M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |  | <b>Grade Level:</b> 60 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  | <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |
| Responsible for overall management of Loan Servicing in compliance with State and Federal law and Credit Union policy.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | Direct the loan functions of the credit union. Direct the staff and activities for loan processing, and loan origination and servicing. Responsible for overseeing back office operations and delivery of products and services to members.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |  | <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |
| <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Maintain Loan Origination system for areas of influence including tracking and updating of daily pricing of all mortgages</li> <li>• Oversee a multitude of servicing related issues including the timely mailing of paid notes, mortgages, releases of liens, subordinations, and modifications; identify and troubleshoot loan maintenance corrections, assist with the reconsolidation of various general ledgers</li> <li>• Prepare reports pertaining to mortgage activities, mortgage outsource provider performance, and annual escrow analysis for members; oversee the accurate and timely storage of electronic mortgage files</li> <li>• Review and update Loan Servicing Department policies and operating procedures consistent with overall loan policy; identify opportunities for automating various servicing functions through the use of technology to increase efficiency and effectiveness</li> <li>• Oversee all aspects of third party vendor relationships to research, develop and implement servicing related programs and projects</li> <li>• Assist with the onsite audit or examiners visits; implement policy and procedure changes on compliance findings as noted and ensures periodic review</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  | <ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Direct all loan activities, analyze business critical systems and proactively resolve strategic issues to ensure members are served</li> <li>• Manage loan processing systems and implement solutions, new technology and system enhancements and procedures to improve productivity, accuracy, control and throughput of loan processing; ensure system compliance with applicable policy</li> <li>• Develop, implement and enforce loan policies and operating procedures</li> <li>• Collaborate with management to achieve credit union wide business plan objectives and advises on credit union strategic planning</li> <li>• Review and manage all aspects of third party vendor relationships</li> <li>• Serve as the principal source of information for loan products and services</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |  |

| Basic Qualifications                                                                                                                                                                                                                                                                                  | Basic Qualifications                                                                                                                                                                                                                                                  | Basic Qualifications                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 3 year's relevant work experience</li> </ul>                                                                                                                                      | <ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 10 year's relevant work experience</li> <li>Supervisory Experience</li> </ul>                                                                     |                                      |
| Additional Qualifications and Skills                                                                                                                                                                                                                                                                  | Additional Qualifications and Skills                                                                                                                                                                                                                                  | Additional Qualifications and Skills |
| <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> <li>Supervisory Experience</li> </ul> | <ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>Working knowledge of basic financial administration principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul> |                                      |
| Certificates and Licenses                                                                                                                                                                                                                                                                             | Certificates and Licenses                                                                                                                                                                                                                                             | Certificates and Licenses            |
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| Physical Requirements                                                                                                                                                                                                                                                                                 | Physical Requirements                                                                                                                                                                                                                                                 | Physical Requirements                |
|                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                       |                                      |
| Working Conditions                                                                                                                                                                                                                                                                                    | Working Conditions                                                                                                                                                                                                                                                    | Working Conditions                   |
| <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>                                                                                                                                                                              |                                      |

## Job Family Matrix

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| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Job Family:</b> Banking - Management      |                                              |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                              |                                              |
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| <b>Job Title:</b> Mortgage Loan Mgt II                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Job Title:</b>                            | <b>Job Title:</b>                            |
| <b>Job Code:</b> F2156M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Job Code:</b>                             | <b>Job Code:</b>                             |
| <b>Grade Level:</b> 56 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Grade Level:</b> <b>Exemption:</b> Exempt | <b>Grade Level:</b> <b>Exemption:</b> Exempt |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Effective/Revision Date:</b>              | <b>Effective/Revision Date:</b>              |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Job Summary</b>                           | <b>Job Summary</b>                           |
| Responsible for all aspects of active mortgages in process. Manage systems and processes in accordance with established credit union policies and procedures.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                              |                                              |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Core Duties</b>                           | <b>Core Duties</b>                           |
| <ul style="list-style-type: none"> <li>Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>Oversee real estate mortgages through full cycle process, including pre-approvals, denials, counter-offers; ensure all conditions are met and reflected in final mortgage documentation in accordance with credit union/investor guidelines</li> <li>Oversee the closing of second mortgages</li> <li>Ensure data integrity on origination and underwriting systems of permanent loan records</li> <li>Oversee all aspects of third party vendor relationships; ensure updated contracts, privacy issues are in accordance with the Credit Union policy standards, turn-a-round times and overall services standards</li> <li>Manage the Credit Union on-line application and underwriting system</li> <li>Review and update mortgage policy manual as needed</li> <li>Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |                                              |                                              |

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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|---------------------------------------------|
| <b>Basic Qualifications</b>                                                                                                                                                                                                                                                                                   | <b>Basic Qualifications</b>                 | <b>Basic Qualifications</b>                 |
| <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 year's relevant work experience</li> </ul>                                                                                                                                          |                                             |                                             |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                                                   | <b>Additional Qualifications and Skills</b> | <b>Additional Qualifications and Skills</b> |
| <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory Experience</li> </ul> |                                             |                                             |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                                                              | <b>Certificates and Licenses</b>            | <b>Certificates and Licenses</b>            |
|                                                                                                                                                                                                                                                                                                               |                                             |                                             |
| <b>Physical Requirements</b>                                                                                                                                                                                                                                                                                  | <b>Physical Requirements</b>                | <b>Physical Requirements</b>                |
|                                                                                                                                                                                                                                                                                                               |                                             |                                             |
| <b>Working Conditions</b>                                                                                                                                                                                                                                                                                     | <b>Working Conditions</b>                   | <b>Working Conditions</b>                   |
| <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                                                    |                                             |                                             |



## Job Family Matrix

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                              |                                              |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------------------------------------|--|
| <b>Job Function:</b> Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                              | <b>Job Family:</b> Banking - Management      |  |
| <b>Job Family Summary:</b> Perform or manage a wide range of banking activities while ensuring compliance in various functions which may include: loan operations, card services and branch operations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                              |                                              |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                              |                                              |  |
| <b>Job Title:</b> Electronic Delivery Services Mgt I                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Job Title:</b>                            | <b>Job Title:</b>                            |  |
| <b>Job Code:</b> F1955M                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Job Code:</b>                             | <b>Job Code:</b>                             |  |
| <b>Grade Level:</b> 55 <b>Exemption:</b> Exempt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>Grade Level:</b> <b>Exemption:</b> Exempt | <b>Grade Level:</b> <b>Exemption:</b> Exempt |  |
| <b>Effective/Revision Date:</b> January 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Effective/Revision Date:</b>              | <b>Effective/Revision Date:</b>              |  |
| <b>Job Summary</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                              | <b>Job Summary</b>                           |  |
| Administer specialized electronic delivery systems. Serve as the primary point of contact for service providers, provide high quality technical service and problem resolution.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                              |                                              |  |
| <b>Core Duties</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                              | <b>Core Duties</b>                           |  |
| <ul style="list-style-type: none"> <li>Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>Administer specialized electronic delivery systems including online banking, online account opening, online bill pay and mobile banking</li> <li>Monitor and resolve electronic systems problems relating to system performance, membership issues, etc.; implement operational changes</li> <li>Develop systems for improved efficiency and member satisfaction; communicate and implement changes, upgrades and maintenance periods</li> <li>Serve as primary contact with electronic delivery systems vendors</li> <li>May provide training to clients and staff</li> <li>Ensure financial compliance with University policies and procedures and applicable legal rules and banking regulations</li> </ul> |                                              |                                              |  |

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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|---------------------------------------------|
| <b>Basic Qualifications</b>                                                                                                                                                                                                                                                                                   | <b>Basic Qualifications</b>                 | <b>Basic Qualifications</b>                 |
| <ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 1 year relevant work experience</li> </ul>                                                                                                                                            |                                             |                                             |
| <b>Additional Qualifications and Skills</b>                                                                                                                                                                                                                                                                   | <b>Additional Qualifications and Skills</b> | <b>Additional Qualifications and Skills</b> |
| <ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory Experience</li> </ul> |                                             |                                             |
| <b>Certificates and Licenses</b>                                                                                                                                                                                                                                                                              | <b>Certificates and Licenses</b>            | <b>Certificates and Licenses</b>            |
|                                                                                                                                                                                                                                                                                                               |                                             |                                             |
| <b>Physical Requirements</b>                                                                                                                                                                                                                                                                                  | <b>Physical Requirements</b>                | <b>Physical Requirements</b>                |
|                                                                                                                                                                                                                                                                                                               |                                             |                                             |
| <b>Working Conditions</b>                                                                                                                                                                                                                                                                                     | <b>Working Conditions</b>                   | <b>Working Conditions</b>                   |
| <ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>                                                                                                                                                                                                                    |                                             |                                             |