

Position Description (PD)

Title	Team Leader
Contracted hours	38 hours per week
Position Grade	Grade 3
Terms and Conditions	Goulburn Murray Credit Union Enterprise Agreement 2022
Location	Shepparton
Reporting to	Branch Manager (or Retail Sales Lead in the absence of a Branch Manager)

About Us

GMCU is a regional member-owned credit union based in the Goulburn Valley, with its main office located in Shepparton, Victoria. GMCU is for purpose, not profit. We are here to make life better for our members and communities by unleashing what's possible and helping them realise their dreams. We are here to serve them, to genuinely get to know them and seek to support them with financial services and products that meet their needs.

Our Purpose

We're here to unleash what's possible in our communities.

Member first, always
We belong to our members, so everything we do is centered around serving our members with care, integrity, fairness and efficiency.

Excellent Member Experience
We're here for our members with genuine, personal and caring service and convenient online access, anytime.

Integrity and Trust
Responsible, secure lending with great value rates to help our members meet their financial goals. Trust is in our DNA and every decision we make has the wellbeing of our members and the communities we serve at our very centre.

Our Values



INTEGRITY

ethics fairness
honesty

- I deliver on my promises
- I seek the best outcomes for both our members and our organisation
- I am respectful in all of my dealings with others
- I act professionally and promote professional conduct in others
- If I see something that isn't right, I speak up
- I am open and honest in my communications
- I do not participate in gossip



RESPONSIBLE

dependable
accountable reliable

- I take ownership of my actions
- I finish tasks with care and on time
- I protect the security of member information
- I have appropriate needs-based conversations with members
- I can be relied upon
- I acknowledge and learn from mistakes



PROGRESSIVE

growing
developing
improving

- I positively engage in organisational change
- I continually strive to make the credit union better
- When I think there could be a better way of doing something, I raise the suggestion via appropriate channels
- I stay up to date with and promote the products and services that help our members to bank in a modern and convenient way
- I support others to engage in change
- I do not act in ways that undermine organisational outcomes



EXCELLENCE

efficient
pride
quality

- I continually strive to be the best that I can be
- I take pride in what I do
- I go above and beyond in my interactions with members
- I lead by example
- I seek to continually improve my knowledge
- I encourage others to reach their full potential

Position Description (PD)

Position Purpose

The Team Leader supports the Branch Manager in ensuring the effective and efficient day-to-day operations of the branch that are in line with GMCU's Purpose and provide excellent members services every time. It is the responsibility of the Team Leader to ensure that members and non-members are provided with a friendly, comprehensive, and professional service, in accordance with privacy requirements. The Team Leader is also responsible for the monitoring and development of all Member Services Officers (MSO's) and monitoring branch services and performance.

Key Responsibilities, Activities and Duties

Accountability	Details
Service delivery	<ul style="list-style-type: none"> • Ensure the efficient and effective operation of the service function of the branch/es in line with GMCU policies, procedures, and other regulatory requirements. • Deliver and maintain financial transactions/duties and services. • Promote banking and insurance products and services to members and non-members in line with GMCU's purpose and to meet members needs. • Provide friendly, responsive, and well-informed service to members, potential members and the community. • Development and provision of reports as required.
People Leadership	<ul style="list-style-type: none"> • Rostering of employees to support effective service delivery in line with GMCU policies and procedures. • Support and oversee the effective induction of new employees utilising relevant GMCU resources. • Support and oversee the professional development of new and existing employees through training (internal and/or outsourced) and mentoring. • Guiding and supporting a cohesive and productive work environment that is founded on GMCU's values. • Coach, mentor and develop the team to support active employee engagement and effective delivery of member services, GMCU's purpose and strategic objectives. • Encourage and motivate the team to achieve goals, maximise their knowledge, performance and effectiveness. • Supervise the operational functions of the team and co-ordinate workload. • Complete the annual appraisal process for all employees in the team and performance management where identified.
Projects	<ul style="list-style-type: none"> • Support the development and implementation of projects as required, including supporting the team to identify and implement new ways of working.
Relationship Management	<ul style="list-style-type: none"> • Maintain effective relationships with members, colleagues and suppliers to achieve desired GMCU outcomes. • Build local networks in support of the continued growth of GMCU's member base.
Administration and Documentation	<ul style="list-style-type: none"> • Undertake branch administrative activities (including daily reporting) as required. • Ensure that all documentation is accurate, compliant and completed in a timely manner. • Ensure that member records are accurate and up to date.

Quality, Safety, Risk and Improvement

- Demonstrate initiative and a solution focused approach to problem solving.
- Participate in Work Health & Safety activities to ensure a safe work environment for members, the community, staff and visitors.
- Comply with all applicable policy and procedures.



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- Maintain confidentiality on all issues relating to the organisation, members and fellow colleagues.
- Satisfactorily complete all mandatory training requirements.
- Demonstrate understanding of all policy and procedures relating to the position.
- Actively identify and escalate opportunities for improvement where appropriate.
- Keep up to date with best practice HR/WHS approaches, changes in regulations and legislation and other relevant information.
- Demonstrate understanding of risk management, including risk assessments, identify and categorise risks and impact, implement control and mitigation procedures, monitoring and reporting and escalation processes as appropriate.

General Requirements

- Lead by example, being aware of and acting in accordance with GMCU's Code of Conduct and values.
- Positively promote GMCU both personally and professionally.
- Develop and maintain collaborative relationships with all GMCU team members to achieve service delivery excellence.
- Resolve any workplace conflict in a professional manner and through correct organisational processes.
- Maintain a flexible approach to the hours of duty.
- Continually develop both personally and professionally as required to meet the changing needs of the position, organisation and industry.
- Actively participate in the appraisal process.

Other Position Requirements

Statements included in this position description are intended to reflect in general the duties and responsibilities of the position. It is not intended to be an exhaustive list of responsibilities, duties and skills required. GMCU may require other duties to be undertaken as directed or required from time-to-time.

GMCU may alter the duties of this position description if and when the need arises. Any such changes will be made in consultation with the affected employee(s).

Key Selection Criteria

Essential

- A demonstrated commitment to GMCU's values of Integrity, Responsible, Progressive and Excellence.
- Ability to lead a team to support achievement of defined objectives and prioritise workloads as required.
- Ability to champion exceptional customer service standards and delivery.
- Demonstrated problem-solving skills, including the ability to exercise sound judgement, discretion and confidentiality.
- Excellent interpersonal and communication skills, including the ability to liaise with a range of stakeholders.
- Ability to work professionally to complete tasks as an individual and as a member of a team.
- Strong attention to detail and a demonstrated ability to manage competing work priorities to meet tight deadlines.
- Strong working knowledge of key business IT applications, including Microsoft Excel.
- Flexible approach to hours of duty and the ability to work across a number of locations.
- Have an understanding and commitment to needs based selling.
- Proven ability to work productively as a member of a team and contribute to team goals
- The ability to meet GMCU's pre-employment security requirements.
- Current drivers' licenses.

Desirable

- Operational knowledge of GMCU products, services and systems.
- Demonstrated ability in the promotion and sales of financial products and services.
- Cash handling experience.

Reviewed By	Chief Sales & Service Officer
Issued	January 2024
Review Date	January 2025