

**ACTION PLAN: Scrutiny Review of Tees Credit Union**

No.	Recommendation	Proposed Actions / Progress	Success Measures	Responsibility	Date
1	<p>That further opportunities to promote the Credit Union are explored, including:</p> <ul style="list-style-type: none"> <li>• Member Newsletters and social media</li> <li>• Council promotion through Stockton News and social media</li> <li>• Voluntary and Community Sector/ community centres</li> <li>• Charities and Charity Shops</li> </ul>	<p>Sharing posts on SBC social media</p> <p>Member newsletters to share relevant information for residents</p> <p>Share on Catalyst Bulletin</p>	<p>Posts regularly shared from TCU on SBC social media</p> <p>Members distribute information provided through TCU to residents</p> <p>Catalyst share information in their bulletin – provided by TCU</p>	<p>Communications Team SBC</p> <p>Dem services SBC to share with members</p> <p>Catalyst via TCU</p>	<p>With immediate effect and ongoing</p>
2	<p>That partnership working with other financial providers and sectors is strengthened, including:</p> <ul style="list-style-type: none"> <li>• Outreach through community-based organisations and volunteers</li> <li>• Reciprocal referral arrangements between financial providers operating locally</li> <li>• Strengthening of arrangements to refer Credit Union customers to SDAIS</li> <li>• Working to support the Fairer Stockton on Tees framework</li> </ul>	<p>Providers work together to support residents in the borough</p> <p>Tees Credit Union actively works with Infinity Partnership - attending and participating in meetings and activities, where appropriate.</p>	<p>Regular meetings and sharing of information and best practice between providers</p>	<p>TCU</p>	<p>Ongoing</p>
3	<p>That the Credit Union consider whether the name reflects the ambition of the organisation and might be better re-badged Community Bank or People's Bank.</p>	<p>Consideration of the name change by TCU</p>	<p>Process applied to understanding the options and proposed benefits of a name change</p>	<p>TCU</p>	<p>January 2023</p>

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4	That the app to assess benefit entitlement is investigated to understand its value and application and be promoted as appropriate alongside other sources of advice.	TCU look at the app and understand its value, alongside other support, for the organisation and customers  Trial effectiveness of app alongside other methods of support available in branch	This will be used if it proves to be a useful and viable tool	TCU  TCU and SDAIS	October 2022
5	That Councillors and all Council staff are encouraged to set up payroll savings with the Credit Union and become members of the Credit Union.	Employee Engagement / HR share information and encourage staff to sign up to payroll giving with TCU	An increase in take up of savings from payroll	Employee engagement and HR at SBC	March 2023
6	That the membership of the Infinity Partnership be reviewed to ensure that it includes all relevant financial support organisations operating within the Borough.	Infinity partnership / Ian Bartlett as Chair to look at membership of the partnership and ensure that all relevant partners are invited	Updated membership of relevant partners	SBC, TCU, and Infinity Partnership	March 2023