

APPENDIX 1 PROGRESS UPDATE: Review of Tees Credit Union

SCRUTINY MONITORING – PROGRESS UPDATE	
Review:	Tees Credit Union
Link Officer/s:	Margie Stewart-Piercy
Action Plan Agreed:	October 2022

Updates on the progress of actions in relation to agreed recommendations from previous scrutiny reviews are required approximately 12 months after the relevant Select Committee has agreed the Action Plan. Progress updates must be detailed, evidencing what has taken place regarding each recommendation – a grade assessing progress should then be given (see end of document for grading explanation). Any evidence on the impact of the actions undertaken should also be recorded for each recommendation.

Recommendation 1:	<p>That further opportunities to promote the Credit Union are explored, including:</p> <ul style="list-style-type: none"> • Member Newsletters and social media • Council promotion through Stockton News and social media • Voluntary and Community Sector/ community centres • Charities and Charity Shops
Responsibility:	<p>Communications Team SBC</p> <p>Dem services SBC to share with members</p> <p>Catalyst via TCU</p>
Date:	With immediate effect and ongoing
Agreed Action:	<p>Sharing posts on SBC social media</p> <p>Member newsletters to share relevant information for residents</p> <p>Share on Catalyst Bulletin</p>
Agreed Success Measure:	<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>
Evidence of Progress (March 2023):	<p>SBC Communications team share social media posts regularly.</p> <p>Democratic Services have shared information with elected members.</p> <p>Catalyst share via TCU.</p>
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved

APPENDIX 1

PROGRESS UPDATE: Review of Tees Credit Union

Evidence of Impact (March 2023):	Social media posts shared on SBC social media. Elected members can share in their newsletter. Catalyst share on their social media.
----------------------------------	---

Recommendation 2:	That partnership working with other financial providers and sectors is strengthened, including: <ul style="list-style-type: none"> • Outreach through community-based organisations and volunteers • Reciprocal referral arrangements between financial providers operating locally • Strengthening of arrangements to refer Credit Union customers to SDAIS • Working to support the Fairer Stockton on Tees framework
Responsibility:	TCU
Date:	Ongoing
Agreed Action:	Providers work together to support residents in the borough Tees Credit Union actively works with Infinity Partnership - attending and participating in meetings and activities, where appropriate.
Agreed Success Measure:	Regular meetings and sharing of information and best practice between providers
Evidence of Progress (March 2023):	Providers work together where appropriate. Information sharing.
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved
Evidence of Impact (March 2023):	Providers work together for the benefit of the residents in the borough to provide appropriate information across all services.

Recommendation 3:	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.
Responsibility:	TCU
Date:	January 2023
Agreed Action:	Consideration of the name change by TCU
Agreed Success Measure:	Process applied to understanding the options and proposed benefits of a name change

APPENDIX 1 PROGRESS UPDATE: Review of Tees Credit Union

Evidence of Progress (March 2023):	Board meeting to discuss.
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved
Evidence of Impact (March 2023):	Consideration has been given, however at this time there has been a decision not to change the name.

Recommendation 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.
Responsibility:	TCU TCU and SDAIS
Date:	October 2022
Agreed Action:	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
Agreed Success Measure:	This will be used if it proves to be a useful and viable tool
Evidence of Progress (March 2023):	Using the app alongside other face to face meetings.
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved
Evidence of Impact (March 2023):	The app offers an additional option for supporting our residents.

Recommendation 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.
Responsibility:	Employee engagement and HR at SBC
Date:	March 2023
Agreed Action:	Employee Engagement / HR share information and encourage staff to sign up to payroll giving with TCU
Agreed Success Measure:	An increase in take up of savings from payroll

APPENDIX 1 PROGRESS UPDATE: Review of Tees Credit Union

Evidence of Progress (March 2023):	Information on sign up shared and encouraged with staff.
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved
Evidence of Impact (March 2023):	There are currently 150 SBC staff + 6 Schools staff with a deduction to TCU across both loans and savings.

Recommendation 6:	That the membership of the Infinity Partnership be reviewed to ensure that it includes all relevant financial support organisations operating within the Borough.
Responsibility:	SBC, TCU, and Infinity Partnership
Date:	March 2023
Agreed Action:	Infinity partnership / Ian Bartlett as Chair to look at membership of the partnership and ensure that all relevant partners are invited
Agreed Success Measure:	Updated membership of relevant partners
Evidence of Progress (March 2023):	Working with Infinity to ensure membership includes all relevant parties.
Assessment of Progress (March 2023): (include explanation if required)	1 - Fully Achieved /ongoing piece of work to ensure that the membership remains active and relevant
Evidence of Impact (March 2023):	This is an ongoing piece of work to include any partners that would be beneficial to the Infinity partnership.

Assessment of Progress Gradings:	1 Fully Achieved	2 On-Track	3 Slipped	4 Not Achieved
---	----------------------------	----------------------	---------------------	--------------------------