



Introduction to Volunteering



Welcome

Thank you for your enquiry and interest in becoming a FAIRshare Credit Union volunteer.

FAIRshare Credit Union (FCU) recognises its volunteers are a valuable and essential resource in developing its services to members. They play a vital role in developing FCU as a business and maintaining links with members and the local community.

This introduction pack is designed to give you:-

- an insight into FCU
- general information about volunteering
- a guide to the process of becoming a volunteer.

Introduction



Local people helping local people.

FAIRshare Credit Union (FCU) is a friendly, ethical, not-for-profit 'community bank', offering secure savings accounts and affordable loans to its members. In 1994 the Wrekin Council Employees Credit Union was launched, offering credit union services to the employees of Wrekin Council. In 2000 the credit union's name was changed to FAIRshare and the 'common bond' extended to people who live or work in the Telford & Wrekin district. Since then, FAIRshare has grown to become Shropshire's largest Credit Union. Membership is open to anyone who lives, works or studies in the county. Our members are made up from a cross section of the community, with differing backgrounds, ranging from those in highly paid careers, receiving state benefits to junior savers. FCU is regulated like any other bank, building society or financial institution and members' money is protected by the financial services compensation scheme (FSCS).

Our aim is to provide members of the public, with access to low cost affordable loans, while at the same time encouraging them to save on a regular basis. FCU's services are also available to those who may have difficulty obtaining affordable finance elsewhere and may otherwise have to resort to doorstep lenders, or in the worst case scenario loan sharks.



Regulations

All Credit Unions are subject to UK law and are regulated by the Financial Conduct Authority (FCA) and Prudential Regulation Authority (PRA). The rules that FCU works to are based on legislation, regulation and detailed policies and procedures.

To comply with the regulations, FCA / PRA approval is required before individuals can undertake certain roles. These include:-

- All members of the Board of Directors

- Members of the Supervisory Committee and Credit Committee
- General Manager

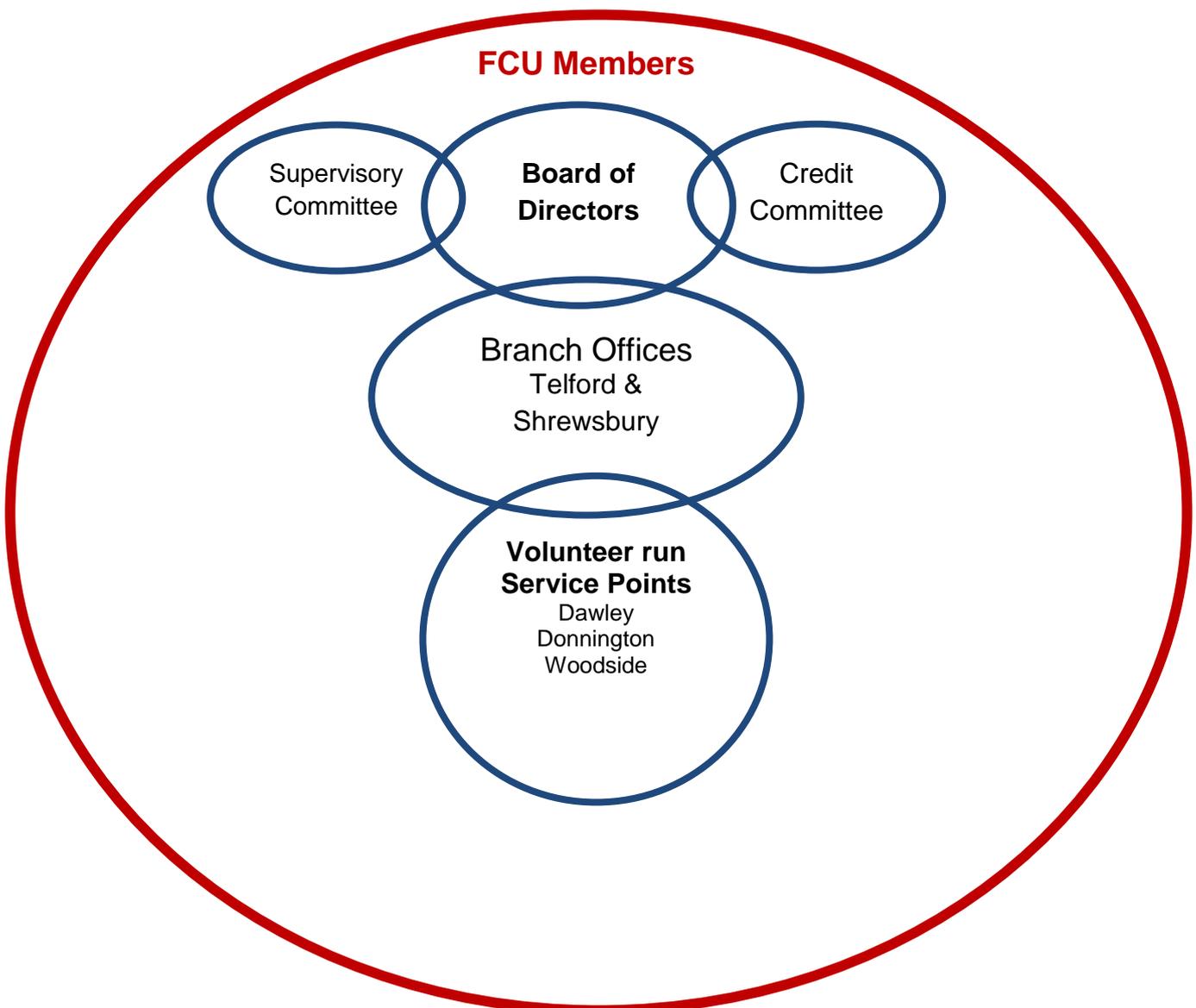
FCU Organisation Overview

Credit Unions are run by their members for the members. They must adopt a structure that complies with the law and establish a set of rules to work too. FCU's rules can be found on our website: - www.fairshare.uk.com

The Board of Directors and Committees are elected by the members. These functions are carried out by committee to ensure the safety of members' money and provide the opportunity for checks on procedures to be carried out.

Before an individual can take up **any** post with FCU, if not already, they must become a member, by opening a share account.

Structure



Volunteering with FAIRshare Credit Union

Getting involved.

As a FCU volunteer you will be supporting the following aims and objectives:-

- Encouraging saving and sensible financial budgeting, for people living, working or studying within the county of Shropshire. Focusing on the most deprived communities across the district and in response to local economic needs.
- Providing an opportunity for all eligible members to borrow money at a reasonable interest rate, irrespective of their previous credit history.
- Encourage young people to save by the development of in house school saving schemes.
- Work together with key stakeholders to promote awareness of the benefits of saving and borrowing from FCU.
- Provide opportunities for members of the community to get involved by volunteering.

Confidentiality

Customer Confidentiality is paramount.



As a volunteer, you will be dealing with private and confidential information about FCU's members. This information is given and held in strictest confidence and must not be discussed with, or disclosed to anyone except staff or authorised partners, who provide the necessary authentication.

Volunteering

Volunteering may give you and or help you with:-

- great personal satisfaction
- personal development
- gaining new skills
- additional experience to add to your C.V.
- supporting members of the local community
- meeting people

In order for volunteering to work for you, it must fit into your lifestyle. The days and number of hours a volunteer commits to FCU will vary according to the work they will be undertaking. Before, volunteering you will need to consider a number of things depending on your circumstances, these include:-

- Appendix A, at the end of this booklet, is a sample job description, of the type of work a volunteer may be doing. Is this the type of work you are interested in doing?
- You are happy to make a commitment to a number of hours, probably at the same time(s) and day(s) each week.

- If you have any medical conditions, you should discuss your proposed role with your doctor and get their advice whether they think it will affect your condition, or your condition will affect your volunteering.
- If you are receiving any state benefits, you will need to let the Department of Work and Pensions (DWP) know, to ensure your entitlement is not affected. Make it clear that you will not gain financially from the arrangement. A copy of DWP booklet – ‘Volunteering while getting benefits’ is available from FCU, if you require further information.
- Appendix B and C, are copies of the ‘Volunteer Agreement’ and ‘Declaration of Secrecy’, you will be required to sign at your induction. You must be happy to sign these agreements.

Supporting Volunteers

Once your volunteer post has been agreed, you will be invited to attend an induction meeting, which will take place at our Shrewsbury branch. Details of what this will include are listed below.

You will be given specific training for the role you will be undertaking and a member of staff will be allocated to mentor and guide you, until you are feeling confident enough to carry out the duties on your own.

We will keep you up to date with any changes that affect your role and any special promotions being run. We would also like to hear your suggestions and comments.



Induction

This will include the following topics:-

- 👤 Role description and the Volunteer agreement.
- 👤 An introduction to the organisation: its staff members and volunteers; its board members and sub-committees.
- 👤 Information about our Code of Conduct and Customer Confidentiality.
- 👤 First points of contact for queries and help.
- 👤 Your Volunteer information / training pack.
- 👤 Details of your initial and ongoing training.
- 👤 Other information as appropriate.
- 👤 An opportunity for you to ask any questions you may have.



Still interested?

At the end of this document are the following forms:-

- Volunteer Application Form
- Volunteer Information

If you would like to be considered, please complete both forms and return them to FCU's Telford office, marked for the attention of the Manager.

The address is Unit 3, Southwater Square, Southwater Way, Telford TF3 4JG

Should you have any further questions please contact us and ask for Mike.
Telephone - Shrewsbury 01743 240403 or Telford 01952 200200.

What happens next

We will acknowledge receipt of your application.

Your details and experience will be reviewed by the Manager. .

We will contact you to let you know our decision as soon as possible, but within 14 working days of receipt of your application.



Job Description (Example)

Service Area:	Branch
Job Title:	Volunteer Member Services Assistant
Job Purpose:	To carry out cashiering duties at branch level, deal with enquiries from members and provide a high level of customer services
Major Tasks:	<p>Provision of a general reception service to the branch, dealing with enquiries, reception duties and other clerical tasks as required</p> <p>Responsible for accepting money from members and the issuing of receipts. Using a computerised system for which training will be given</p> <p>Responsible for balancing, cashing up and preparation of banking</p> <p>Provide a first point of contact and information service in respect of the Credit Union</p> <p>To ensure that the confidentiality of members is maintained</p> <p>Prepare takings for banking, complete relevant paperwork and comply with security procedures for audit purposes</p>
Job Activities:	<p>Comply with logging on/off procedures of the computerised system</p> <p>Provide information to members on Credit Union policies and products for which training will be given</p> <p>Attend relevant training courses</p> <p>Ensure compliance with all Health & Safety and security procedures as instructed</p> <p>Operations Supervisor (regularly)</p> <p>Only those applicable to the level of the post</p>

<p>Contacts:</p> <p>Decisions and Recommendations:</p> <p>Personal Specification:</p>	<p>Experience:</p> <p>Working in a customer services environment</p> <p>Skills, Knowledge and Abilities:</p> <p>Must be numerate</p> <p>Be willing to use PC based applications</p> <p>Have an appropriate telephone manner</p> <p>Personal Qualities:</p> <p>Must be customer orientated and willing</p> <p>Well organised</p> <p>Must be a team member – able to work with and for others</p> <p>Conscientious and reliable</p> <p>Special Conditions:</p> <p>None</p>
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Volunteer Agreement

(Appendix B)

Name of Volunteer

Volunteers are an important part of FCU. We hope that you enjoy volunteering with us and feel a valued part of our team.

This agreement tells you what you can expect from us and what we hope from you. We aim to be flexible, so please let us know if you would like to make any changes and we will do our best to accommodate them.

This agreement reflects the hopes and intentions of the volunteer and FCU, but is not contractually binding in anyway on either party.

FCU will:-

- Ensure you are properly integrated into FCU's structure. That all members of staff work with you in a positive manner and actively involve you in the work of the organisation.
- Provide you with the name of your contact, who is responsible for providing support and supervision on a regular basis.
- Provide an induction and any training necessary to enable you to carry out your role.
- Provide adequate insurance cover whilst undertaking duties approved and authorised by FCU.
- Endeavour to resolve any problems, grievances and difficulties encountered while volunteering, by providing an opportunity to discuss the issues in an appropriate manner.
- Consulting on matters directly or indirectly affecting your voluntary work with FCU.
- Reimburse you for out of pocket expenses.
- Give you a written description of the tasks that make up your voluntary work.

I,....., agree to:-

- Adhere to the role description
- Be reliable and give as much notice as possible when I am unable to attend.
- Follow FCU's rules and procedures, including health and safety, discrimination and equal opportunities.
- Treat fellow volunteers, FCU employees, members and customers with respect and abide by the code of conduct.
- Treat all information relating to FCU, its members, employees and customers in total confidence, during and after cessation of my voluntary work.

Signed

Signed

Date
(Volunteer)

Date
(On behalf of FAIRshare Credit Union)



**DECLARATION OF SECRECY
FAIRshare CREDIT UNION LIMITED.**

I, whose signature is appended to this document, do solemnly promise that,

- ◆ I will at all times keep secret and never divulge any information of the Credit Union or its members that may come into my knowledge. Except by order of the Board of Directors or a Court of Law.
- ◆ I pledge never to do or say anything likely to harm the Credit Union.
- ◆ I will endeavour to acquaint myself with the Rules and Practices of this Credit Union, and with the Laws relating to Credit Unions.
- ◆ I will make known without delay to the Board of Directors or to the Supervisory Committee any fraud on the part of any Officer, Director, Employee or member of this Credit Union. together with any irregularities which may prejudice the Credit Union.
- ◆ I will make every effort within my capabilities to carry out the duties and responsibilities assigned to me in the Credit Union.

PRINT NAME (in full).....

SIGNATURE..... OFFICE HELD.....

DATE.....

WITNESSED..... OFFICE HELD.....

DATE.....

THIS DECLARATION OF SECRECY FORM IS FOR THE PERIOD IN WHICH YOU SERVE AS AN OFFICER, EMPLOYEE AND VOLUNTEER FOR FAIRSHARE CREDIT UNION LTD. IT MUST BE ADHERED TO DURING THIS TIME AND REMAINS IN FORCE WHEN YOU NO LONGER ACT AS A REPRESENTATIVE FOR THE CREDIT UNION

THIS FORM MUST BE KEPT AS A PERMANENT RECORD AND FILED WITH THE MINUTES OF THE BOARD OF DIRECTORS. IT SHOULD BE SIGNED BEFORE ANY OFFICER, EMPLOYEE OR VOLUNTEER WHO CARRIES OUT ANY WORK ON BEHALF OF THE CREDIT UNION.



REG NO 394C

Unit 3, Southwater Square
Southwater Way
Telford
TF3 4JG
☎ 01952 200200

Volunteer Application Form

Please use block capitals

Full Name : _____ Mr/Mrs/Ms/Miss/other _____

Address : _____

Postcode: _____

Home ☎: _____ Work ☎: _____

Mobile ☎: _____ Email: _____

D.O.B : _____

Please state any skills or personal experience which may be relevant to your work as a volunteer for FAIRshare Credit Union:

Current or recent work experience:

What are your hobbies and leisure interests?

Availability

Please complete the '**Volunteer Commitment Form**'

Are there any other 'time' factors e.g. length of time per week, school holidays or other time periods you wish / do not wish to volunteer?

Computers (delete if not applicable)

How would you describe your experience with computers?

Beginner Intermediate Advanced

Would you be willing to undertake general Computer Literacy Training to increase your experience? (free of charge) YES/NO

Would you be willing to undertake computer training specific to Credit Union software? (free of charge) YES/NO

How did you hear about FAIRshare Credit Union's need for volunteers?

Can you suggest any other ways of recruiting volunteers?

General information (delete if not applicable)

Do you have a full driving licence? YES/NO

Do you have your own transport? YES/NO

Have you ever been convicted of a criminal offence? YES/NO

If yes, please give details:

References

Please give the name and address of two referees (not related to you) who FAIRshare Credit Union could contact:

Name: _____ Name: _____

Address: _____ Address: _____

Phone no: _____ Phone no: _____

PLEASE NOTE

*** AS A VOLUNTEER YOU WILL NOT BE EXPECTED TO TAKE ON ANY TASKS OR COMMITMENTS WHICH YOU DO NOT FIND ACCEPTABLE.**

I confirm that to the best of my knowledge the information on this form is correct and

I agree to treat any information given to me in regard of my voluntary work for FAIRshare Credit Union as confidential.

Signed : _____

Date : _____



Volunteer Commitment Form

Name: _____

Address: _____

Commitment

I have read the 'Introduction to Volunteering' booklet and fully understand the commitment required of FAIRshare Credit Union (FCU) volunteers.

If my application is successful:-

- I will become / remain a member of FCU
- I will to the best of my ability, meet my obligations as a FCU volunteer.
- Comply with FCU's rules

Signed Date

	Times available for work
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

Available to Volunteer at:-

- Telford Shrewsbury
- Other (please specify)