

Thank you for Applying!

Volunteering means being a Champion for Point West Members.

This starts with our **Point West Declaration of Beliefs:**

Citizens of Point West.

We always have been and always will be a safe space for anyone who needs it. Walking in our doors makes you a Citizen of Point West.

People Helping People.

We treat all people with respect and dignity and offer honest service, without prejudice. This has always been our standard and nothing will change that.

Banking without Borders.

Where you were born should not determine how you live. We offer lending and services to immigrants and all members of the Hispanic community, and we have been awarded the prestigious Juntos Avanzamos designation.

Minority is the Majority.

Our community is richer for its diversity of people and voices. We find unity in our differences.

Transforming Lives.

Financial empowerment is at the core of happy and healthy lives. Our passion and our DNA is to help individuals and local businesses get on their feet and take control of their destinies.

Accountable to the Underserved.

Financial equity is not for a select few. We welcome all people, especially those who have been turned down elsewhere.



Please read carefully and initial your understanding and commitment where requested.

Volunteer Responsibilities:

1. **Lead the Credit Union's Strategic Ends and Declaration of Beliefs.** Volunteers bring a wealth of knowledge, skills and abilities which aid in cultivating and activating the credit union mission. Your volunteerism will help guide financial empowerment for people and small businesses from all walks of life.
2. **Represent and be the Voice for Point West Members and future members.**
3. **Govern in a way which ensures plans are followed and goals are met.** This is achieved through monitoring reports of financial standing audit activity, key ratios and goals established during the Annual Strategic Planning Session.
4. **Ensure the credit union is capably managed, and:**
 - o Operates ethically and inclusively
 - o Complies with all applicable laws and regulations
 - o Operates safely and soundly, providing adequate financial reserves; and protects the credit union through safety and soundness measures
5. **Engage in learning.** The Board ensures every volunteer is provided ongoing training and resources about governing a credit union, the strategic business of Point West, and future opportunities which foster innovation and inclusiveness to serve our members in a safe and sound manner for years to come.
6. **Advocate for the credit union.** Develop cooperative relationships within the industry and communities we serve.
7. **Attend Meetings (no more than three (3) missed meetings per year) (Initial:____)**
 - a. Eight (8) monthly board meetings
 - b. Annual Meeting of the Membership (second Tuesday in May)
 - c. One (1) Saturday Planning Session (third Saturday in May)
 - d. Supervisory Committee Members: quarterly meetings
8. **Be prepared.**
 - o Read meeting packet/materials and comment/ask questions **prior to the meeting.**
 - o Submit questions to management regarding meeting materials, one day prior to the meeting, so management has time to research and prepare answers **(Initial:____)**
 - o I have the ability to access materials online on a regular basis **(Initial:____)**

LENGTH OF TERMS

- a. Board of Director Terms are 3 years
- b. Supervisory Committee appointed annually by the Board
- c. Board Committee assignments renew annually (ALCO, Nominations Committee and DEI Committee):

TIME COMMITMENT - BOARD OF DIRECTORS

1. **Monthly Regular Meeting Commitment: 4 hours** (time spent preparing for and attending meeting)
2. **Additional Events for Community and Member Outreach: 6-8 hours annually**
3. **Continuing Education: 8-24 hours annually**
 - Educational opportunities include: Conferences, Webinars, Self-Directed Learning

TIME COMMITMENT - BOARD COMMITTEES

- **ALCO:** meets quarterly
- **Governance:** twice a quarter
- **Nominations Committee:** monthly; and candidate interviews
- **DEI Committee:** twice a quarter

TIME COMMITMENT - SUPERVISORY COMMITTEE

1. **Quarterly meeting commitment: 4-6 hours** (time spent preparing for and attending meeting)
2. **Continuing Education: 8-24 hours annually**
 - Educational opportunities include training with the Board of Directors; Supervisory Committee specific content.

Email to:
contact@pointwestcu.com

Eligibility Requirements:

- Must at least 18 years of age.
- Must be a member in good standing.
- Must pass a background check.
- Must maintain the highest standards of personal and professional ethical conduct.

Required application documents:

- Résumé
- Volunteer Application

Applying for:

Board of Directors
Supervisory Committee
Associate

- New
- Renomination
- New
- Renomination
- Non-Voting Position

APPLICANT INFORMATION:

First and Last Name

Mailing Address, City, State, Zip Code

Mobile Phone Number

Alternate Phone Number

Email

Alternate Email

I am currently a Point West Member: Yes No

| References | Name | Relationship | Phone Number or Email |
|---------------------------|------|--------------|-----------------------|
| Professional Reference #1 | | | |
| Professional Reference #2 | | | |

QUESTIONS:

ALL APPLICANTS:

1. Why do you want to volunteer with Point West? Please be specific.

500 characters or less

2. How do you give back to the community?

500 characters or less

CURRENT VOLUNTEERS ONLY:

3. In 10 years, how do you see Point West serving its members and community?

500 characters or less

NEW APPLICANTS ONLY:

4. What specific knowledge, skills, and abilities do you have, that will benefit the Board and/or Supervisory Committee?

500 characters or less



We believe in an inclusive community. We believe in our people. We want **Point West Champions** of these Beliefs for our Board & Supervisory Committee.

Application Conditions:

Volunteers of Point West are representatives of the credit union membership. We look to attract a diverse volunteer base to reflect our Cooperative, while also seeking knowledge, skills, abilities, experience and community engagement to help meet the needs of the Board and Supervisory Committee.

This organization does not discriminate in nominating on a basis of race, color, religion, sex, national origin, disability, veteran status, or your membership in any protected class protected under law of this jurisdiction.

When processing this application, Point West may request a background check about you, contact references you provide, or any other person listed in this application regarding the statements made herein and your suitability for volunteerism (**Initial:_____**). This inquiry may include information as to your general character, reputation and volunteer characteristics.

Your application will be given the consideration it deserves. Completing an application does not imply you will be offered a volunteer position. By signing below, you understand and acknowledge nothing contained in this application or any information gained or discussed during the interview process creates a contract between you and Point West. Should this application and the process surrounding this application result in your volunteerism, unless otherwise stated in a contract, you understand your volunteer relationship with Point West can terminate at any time, with or without notice or reason.

By signing, you certify all statements made by you on this application are true and complete to the best of your knowledge and you understand any misrepresentations or omissions by you may be the cause for rejection of your application, or may be cause for subsequent dismissal if you are elected/appointed.

Signature

Date