



NEW ZEALAND FEDERATION OF
FAMILY BUDGETING SERVICES (INC.)

TE RŌPŪ PENAPENA PŪTEA
WHĀNAU O AOTEAROA

AFFILIATION CRITERIA

NOVEMBER 2008

The Affiliation Criteria of the New Zealand Federation of Family Budgeting Services Inc are that:

An affiliated service must be an incorporated body in its own right or part of an incorporated society (i.e. an incorporated society, a company incorporated under the Companies Act 1993, a charitable trust incorporated under the Charitable Trusts Act 1957, a Whenua Topu Trust pursuant to the Te Ture Whenua Maori Act 1993, a Maori Incorporation pursuant to the Te Ture Whenua Maori Act 1993, a friendly society registered under the Friendly Societies and Credit Unions Act 1982, or a Credit Union under the Friendly Society and Credit Unions Act 1982).

1. For stand alone budget services, there is a separate management committee of at least four people responsible for the budget service with at least one member not a 'working' budget adviser. This committee to supply direction, support and keep accurate financial and other records. Management structure will reflect the community base. When a budget service comes under the umbrella of another organisation or is part of an holistic organisation, there should be a clear and defined structure which is able to provide direction, support and keep accurate financial and other records specific to the budget services work

1a. There are a minimum of three, certificated budget advisers in the budget service, unless approved by the Federation's National Board after discussion with the District Representative. There must be at least two active certificated advisers in all cases. To be recognised as a certificated budget adviser each individual must have attained the Certificate of Competency in Budget Advising that is issued by the Federation and maintained ongoing training as prescribed by the Federation's National Board. The National Board will not recognise the Certificate of Competency in Budget Advising as current if the individual to whom the certificate was issued ceases to be a member of an affiliated budget service, or does not complete the prescribed ongoing training or is found by the National Board to be offering budgeting advice or otherwise acting in ways that are not in accordance with current NZFFBS Inc budgeting procedures.

2. Budgeting procedures are carried out in accordance with the current NZFFBS Inc. procedures.

3. The budget service agrees to work within the Code of Ethics, the aims and objects of the Federation and guidelines contained in the Budget Service Manual.

4. Budget services are expected to participate in meetings and events organised by the Federation.

5. The budget service will ensure that actions of its members will not bring into disrepute either the family budget service in its own community or the Federation nationwide and that any past complaint resulting in affiliation status being brought into question has been addressed to the satisfaction of the Chief Executive Officer.

6. The budget service provides basic statistics and any other pertinent information as required by the Federation. Failure to provide statistics and to return the annual re-affiliation form by **31 July** to the Federation Office as requested, will result in the service's affiliation lapsing. It will be necessary, then, to make application as a new affiliate. Statistics are to be returned to the Federation from all services, except those that have been affiliated for three months or less at 30 June.

7. The budget service will provide free, confidential, non-judgemental advice to its clients.
8. The budget service will offer clients an ongoing, educational component and will inform clients of other available education options within the community.
9. The budget service participates in the nomination, election and support of District and Regional Representatives and Federation Officers, and complies with Federation policy.
10. The budget service will ensure that every budget adviser working in the service is recognised as a certificated budget adviser (as described in Criteria 1a) and that each adviser accepts an annual performance review to ensure that the standard is maintained and such other training as prescribed from time to time.
11. The budget service must not make national media statements without the consent of the Federation. The budget service may make public comment on local matters provided that those statements do not bring the Federation and its members into disrepute.
12. The budget service will use Federation stationery in a fit and proper manner and will not distribute it to unauthorised persons.
13. All prospective budget advisers, and other budget service workers, will be screened as to suitability.
14. The budget service affirms that family budgeting is a matter of education, advice and guidance. The principle of authoritarian management is rejected.
15. Before voting at any General Meeting of the Federation, a budget service shall be affiliated at least 28 days prior to that meeting. Full affiliation is effective from date of decision by the National Board or such earlier date notified by the Secretary. This should be within seven days of receipt, by Federation Office, of the fully completed Application Form, which has been signed and supported by the District Representative.
16. Affiliation Application Forms are supported and signed by the District Representative. Where a District Representative is either a paid employee or a member of the Management Committee of the budget service requesting affiliation, then that District Representative shall ask either the Regional Representative or a neighbouring District Representative to sign the form.

The Objects of the New Zealand Federation of Family Budgeting Services Inc are:

- (a) To help people in New Zealand manage more effectively their financial resources for the benefit of the family/whanau unit as a whole and for family/whanau members individually.
- (b) To promote communication and liaison between family budgeting organisations, local authorities and individuals in New Zealand in all aspects of budget advisory services.
- (c) To promote and encourage high standards of service amongst organisations and individuals engaged in budget advisory work within New Zealand
- (d) To promote and assist in programmes, services and developments as may be beneficial to family budget services within New Zealand.

- (e) To liaise between organisations, local authorities and individuals in New Zealand engaged in providing a budget service, and to represent these persons in dealings with the Government Departments, commercial organisations and the general public.
- (f) To complement and extend family budget services and work being done in New Zealand by organisations, local authorities and individuals.
- (g) To engage in promotional and educational activities regarding household/family budgeting to foster the New Zealand public's awareness of family budgeting as a means of managing a family's financial resources.
- (h) To ensure that family budgeting assistance is available and culturally sensitive to all people in New Zealand.
- (i) To ensure that Te Tiriti o Waitangi is fundamental to the operation of the Federation and to develop relationships to uphold this.
- (j) To do all such lawful things as may be deemed incidental or conducive to the attainment of the foregoing objects or any of them.