

Affiliation Criteria

May 2013



NEW ZEALAND FEDERATION OF
FAMILY BUDGETING SERVICES (INC.)
TE RŌPŪ PENAPENA PŪTEA
WHĀNAU O AOTEAROA

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 (ie 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 standalone budgeting services, there is a separate governance body of at least four people responsible for the budgeting service with at least one member not a 'working' budget adviser. This committee to supply direction, support and keep accurate financial and other records. Governance structure will reflect the community base. When a budgeting 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 budgeting services work.
 - 1a. There are a minimum of four certificated budget advisers in the budgeting service, unless approved by the New Zealand Federation of Family Budgeting Services (NZFFBS) 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 NZFFBS National Office and maintained ongoing training as prescribed by the NZFFBS 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 budgeting 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 budgeting procedures.
2. Budgeting procedures are carried out in accordance with the current NZFFBS procedures.
3. The budgeting service agrees to work within the Code of Ethics, the aims and objects of the NZFFBS and guidelines contained in the Budget Service Manual.
4. Budgeting services are expected to participate in meetings and events organised by the NZFFBS.
5. The budgeting service will ensure that actions of its members will not bring into disrepute either the family budgeting service in its own community or the NZFFBS 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 budgeting service provides statistics and any other pertinent information as required by the NZFFBS. Failure to provide statistics and to return the annual re-affiliation form by 31 July to the NZFFBS National 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 NZFFBS from all services, except those that have been affiliated for three months or less at 30 June.

7. The budgeting service will provide free, confidential, non-judgmental advice to its clients.
8. The budgeting service will offer clients an ongoing, educational component and will inform clients of other available education options within the community.
9. The budgeting service participates in the nomination, election and support of District and Regional Representatives and NZFFBS Officers, and complies with NZFFBS policy.
10. The budgeting 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 budgeting service must not make national media statements without the consent of the NZFFBS. The budgeting service may make public comment on local matters provided that those statements do not bring the NZFFBS and its members into disrepute.
12. The budgeting service will use NZFFBS stationery in a fit and proper manner and will not distribute it to unauthorised persons.
- 12a. The budgeting service agrees that all resources that the NZFFBS has provided to it will remain the property of the NZFFBS. The budgeting service will not permit any copying or other reproduction of the resources, nor use or allow the resources to be used by anyone, except for the sole purpose of providing budgeting advice or services while affiliated with the NZFFBS. The budgeting service will not disclose the resources to anyone other than to persons associated with its organisation and only on the condition that they will comply with these obligations. The budgeting service will be responsible for ensuring their compliance. If the budgeting service discontinues affiliation, or is disaffiliated, for any reason whatsoever, all the NZFFBS resources held will be returned to the NZFFBS National Office immediately at the budgeting service's own cost. The budgeting service will be responsible for ensuring that any persons associated with its organisation, to whom it has disclosed the resources, return the resources to the budgeting service if they cease to be associated with its organisation.
13. All prospective budget advisers, and other budgeting service workers, will be screened as to suitability.
14. The budgeting 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 NZFFBS, a budgeting 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 NZFFBS National 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 the budgeting service requesting affiliation is the service of the District Representative, the

District Representative shall ask either the Regional Representative or a neighbouring District Representative to sign the form.

17. Every affiliated budgeting service shall make a policy relating to its position on Total Money Management and shall review its policy at least once a year. Such policy may prescribe:
 - a) That Total Money Management will not be available.
 - b) The maximum number of clients to whom the budgeting service will offer Total Money Management concurrently.
 - c) Signatories for financial transactions
 - d) The persons to conduct the internal audits.
 - e) When and how a dispensation to any part of the policy shall be sought and given.

18. The budgeting service acknowledges that if it breaches the Affiliation Criteria, the Code of Ethics or the policies contained in the Budget Service Manual, the Federation may take any action it considers appropriate, including, without limitation, revoking the budgeting service's affiliation or seeking to recover any losses the Federation has suffered.