



Eligibility questionnaire

The IFW aims to ensure all our partner members are themselves committed to the wellbeing of their staff and stakeholders. IFW has worked with Happy City, a leading provider of Wellbeing Measurement tools, to create this short questionnaire to help you reflect on your current wellbeing policies and practices.

We will use your responses to make an initial assessment of our partners' commitment to measuring, planning for and delivering wellbeing improvements on a regular basis. For IFW membership consideration, we require your organisation to answer YES to the question A for at least one of the three areas outlined (Measure, Plan, Improve).

If you are not able to answer YES in any area, we can arrange to speak with you about your intended plans to meet our requirements. Both IFW and Happy City are able to support ongoing improvements in these areas where required.

Please note that your response will not be used in any way by the IFW for publicity purposes. It will be shared only with the IFW Membership Committee and Exec for purposes of decisioning your membership.

This questionnaire *will* be available on our website as part of our methodology when considering new Partner Members. We will not name organisations that do not successfully pass our assessment. However, any company who does become a Partner Member will be known to have passed the assessment.

Internal

These questions will help us to assess how your organisation treats its employees with regard to their wellbeing.

1. Measuring

A. Does your organisation regularly measure employee wellbeing (over and above job satisfaction or engagement)?	Yes / No / Unsure
B. If yes, how does your organisation measure this? Please provide detail of typical methods and frequency.	

2. Planning & Policies

A. Does your organisation have a policy or strategy in place which articulates your commitment to improving employee wellbeing?	Yes / No / Unsure
B. If yes, please provide details, including any relevant documentation.	

3. Improving

A. Has your organisation actively supported employees to improve their wellbeing in the last 12 months? (This could include, for example, training programmes, wellbeing focused benefits... etc)	Yes / No / Unsure
B. If yes, please provide details, including any relevant documentation.	

External

These questions will help us to assess whether your organisation is fully committed to the financial wellbeing of your clients and customers.

4. Measuring

A. Does your organisation utilise Net Promoter Scores (NPS) or a similar measure over and above customer satisfaction?	Yes / No / Unsure
B. If yes, please provide details, including any relevant documentation.	

5. What is Financial Wellbeing?

A. Please provide your definition of financial wellbeing	
B. Please provide examples of how your organisations promotes financial wellbeing outside of your direct products and services	

6. Your products and services

A. Please provide examples of how your products and services help clients increase their financial wellbeing as defined in question 5. Please be as specific as possible	
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