



## Partner Member Application Process

The IFW aims to ensure all our partners are themselves committed to the wellbeing of their staff and stakeholders.

After reviewing the Partner Member Brochure and this document, please use the 'Enquire Now' button on our Partner Member page to express interest in becoming a Partner Member.

A member of the IFW team will be in contact, usually within 1-2 days to setup an informal chat to discuss your interest in joining the IFW and understand any specific requirements that your organisation may have.

Following the initial meeting you will be invited to complete the below eligibility questionnaire. Once complete, the questionnaire and any supporting evidence should be forwarded to [members@ifw.org.uk](mailto:members@ifw.org.uk).

The IFW Membership Committee will review the questionnaire and supporting evidence within 14 days of receipt. Additional checks will be completed using publicly available sources including but not limited to:

- your organisation's website
- Google search
- the FCA Register (if applicable)
- VouchedFor.co.uk
- Trustpilot
- Defaqto
- Glassdoor.co.uk (colleague & candidate reviews)

Any questions arising from the review will be discussed with you in advance of the Membership Committee meeting to review your application.

The IFW Membership Committee will review the application and agree one of the following outcomes:

- **Approved** - your organisation is admitted to the IFW as a Partner Member for 1 year
- **Provisionally Approved** - your organisation is admitted to the IFW on a provisional basis due to missing or incomplete information, or in the event the organisation has not been trading long enough to establish a full profile
- **Rejected** - your organisation is not admitted as a Partner Member

You will be notified of the outcome of your application. Where the decision is 'Provisionally Approved' or 'Rejected' feedback will be provided. Provisional Members may make use of the IFW's resources and experts to convert their membership to a full membership during their membership year.

Note: Details of organisations whose applications have been rejected will not be shared publicly

Successful applicants will be contacted to agree contract terms, social media and press strategies, and to discuss additional opportunities.

## **Eligibility questionnaire for the Institute of Financial Wellbeing**

The IFW has worked with the Centre for Thriving Places, 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 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 though are interested in IFW membership, we can arrange to speak with you about your intended plans to meet our requirements. Both IFW and the Centre for Thriving Places 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 with the Centre for Thriving Places to help assess the response, who will not share the information outside their organisation.

These questions *will* be shown on our website as being our methodology when accept Partner Members. We will not name any companies that do 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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