

# Accredited Advisor Terms of Reference

*Please send a signed copy of these Terms of Reference to the Future-Fit team.*

## Introduction

The Future-Fit® Business Benchmark is a tool to help companies and investors transform how they create enduring value, for themselves and society as a whole. While the tool itself is free, the journey to future-fitness will be challenging for any business – and many of them will need help.

The Future-Fit Accredited Advisor program is designed to foster an ecosystem of individuals and organisations who can provide high-quality advice and/or solutions to help businesses adopt the Future-Fit approach. These Terms of Reference outline what we at Future-Fit expect from Accredited Advisors, and what you can expect from us in return.

Thank you for working with us to usher in an environmentally restorative, socially just and economically inclusive society – and welcome to the Future-Fit community!

## Key Definitions & Abbreviations

- **FFBB** – Future-Fit Business Benchmark – the open source self-assessment tool, its underlying methodology, and all related materials published by Future-Fit Foundation.
- **FFF** – Future-Fit Foundation – the UK-based charity which develops, stewards and promotes the use of the FFBB.
- **FFL** – Future-Fit Ltd – the 100% owned trading subsidiary of Future-Fit Foundation which operates and maintains the Future-Fit community and programs.
- **FFPT** – Future-Fit Proficiency Test – an online exam which is used to verify that an individual understands and is familiar with the FFBB and is proficient in its use.
- **Accredited Advisor** – an individual or organization who has fulfilled the specific criteria to be accredited by FFL to advise on and/or provide business services and solutions that support the use of the FFBB.
- **Accredited Advisor Logo** – Visual mark which serves to recognize the Accredited Advisor’s status, for use on their website and in marketing materials.
- **Membership Period** – The duration of the Accredited Advisor’s membership in the program.

## Expectations of Future-Fit Accredited Advisors

All Accredited Advisors must ensure the following:

1. You or a member within your organization have passed the FFPT.
2. You have provided three reference forms from either:
  - a. Clients relating to work undertaken within twelve months of your application.<sup>1</sup> The forms should explicitly reference the kinds of service(s) which you are seeking to provide with respect to your use of the FFBB (e.g., strategic consultancy, assurance)<sup>2</sup>; or
  - b. Colleagues who have worked with you or your chosen individual Accredited Advisor(s) for a period of longer than 12 months. The forms should explicitly highlight the key skills which they will utilize with respect to the organization's use of the FFBB (e.g., strategic consultancy, assurance).
3. You have paid the fees as agreed between you and FFL (see below).
4. You will use the FFBB in good faith, and you will not seek to alter or adapt the criteria used to assess progress toward future-fitness.
5. You will ensure that you review all direct communications shared with you by FFF and FFL, and at FFL's request will complete any short update tests or retake any FFPT modules as deemed necessary (this will happen only if the FFPT is updated significantly). This is to ensure that your expertise is aligned with the most recent version of the FFBB.
6. Wherever you refer to your Accredited Advisor status in digital form (e.g., on your website) you must link directly to your Accredited Advisor profile page on the Future-Fit website and (where the media allows) use the Accredited Advisor Logo.
7. Accreditation is designed to recognize your technical understanding of the FFBB. You must not express or imply, verbally or in any written form, that FFF or FFL in any way guarantee the quality or delivery of your or your organization's product(s) or service(s).
8. You will be granted membership to the online Future-Fit Changemaker Community platform ("the Community"). The Community is a space for co-learning and collaboration, and you are therefore asked to abide by this spirit and not use the community to sell your services directly to other members or otherwise engage in direct marketing activities.

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<sup>1</sup> See Future-Fit Reference template document.

<sup>2</sup> For the avoidance of doubt, the three reference letters must cover between them all of the services for which you wish to be recognized, but we do not require three references *per service*.

For organization's seeking Accredited Advisor status, the following also apply:

9. At least one current employee must qualify individually as an Accredited Advisor.
10. Whenever the organization offers any client services relating to the FFBB, at least one of the individually qualified Accredited Advisors must be directly involved in the formulation of (and be at least partly accountable for) the client proposal and the bid process.
11. Whenever the organization provides any client services relating to the FFBB, at least one of the individually qualified Accredited Advisors must be directly involved in some part of the delivery of the work.
12. In the event of an individual Accredited Advisor leaving the organization's employment prior to the end of the Membership Period, you must notify FFL as soon as reasonably possible, and you may accredit another employee in their place at no extra cost. The replacement individual's initial accreditation will last until the end of your Membership Period. The departing individual may also retain their Accredited Advisor status until the same date.
13. If the organization has only one individual Accredited Advisor, and that individual leaves the organization prior to the end of your Membership Period, you must nominate another employee ("the Nominee") to take the place of the departing individual. Also:
  - a. The Accredited Advisor's benefits (as defined below) will be suspended until the Nominee achieves certification.
  - b. There will be no extension to the Membership Period. If the Nominee becomes an Accredited Advisor before the end of the relevant period, the Accredited Advisor's benefits will recommence and run to the end of the Membership Period along with the Nominee's accreditation. If the Membership Period ends before the Nominee becomes an Accredited Advisor, then the organization will be invited to renew its membership once the Nominee has achieved accreditation (subject to the other membership criteria listed herein).

If any Accredited Advisor (individual or organization) is deemed by FFL to be in breach of any of these requirements, their status will be reviewed and may result in immediate termination of Accredited Advisor membership, with no refund for fees paid.

## Duration of Membership

1. The Membership Period begins when:
  - a. You, or at least one of your employees, has passed the FFPT;
  - b. You have provided the necessary client references to FFL and they have been approved; and
  - c. You have paid the Accredited Partner Fee to FFL (see below).

FFL will notify you of the exact start date of your Membership Period.

2. The Membership Period lasts for one year, after which your benefits as an Accredited Advisor cease unless you choose to renew (see below).
3. You are under no obligation to continue your Accredited Advisor membership and are free to end the partnership at any time during the Membership Period. Should you decide to terminate the partnership, you will inform FFL in writing and remove any mention of your Accredited Advisor status from your website and all marketing materials. Your right to use the Accredited Advisor Logo in any media will cease when your membership ends.
4. In the event of early termination, membership fees already paid are non-refundable.

## Membership Renewal

1. Assuming you have abided by these Terms of Reference, you will be invited to renew your Accredited Advisor status one month before the end of the Membership Period.
2. Upon renewal, you will be asked to submit a short self-certification form summarizing any Future-Fit work you have undertaken during the prior Membership Period and confirming that you have kept up to date with any FFBB developments.
3. All Accredited Advisors will be expected to re-take the FFPT every three years at a minimum, even if the FPPT has not been updated during that time.
4. These Terms of Reference will be reviewed annually. If any material changes are made, you will be notified of them at least one month before the end of your Membership Period.

## Benefits of Membership

For the duration of the membership, you will receive the following benefits:

1. Individual and/or organizational description as a “Future-Fit Accredited Advisor” and the right to use the Accredited Advisor Logo on your website and in any other marketing materials.
2. A dedicated profile page and inclusion in a searchable database of Accredited Advisors, accessible to the public via the Future-Fit website. Organizations will be able to list the names and job descriptions of their individual Accredited Advisors.
3. Two in-person meetings or video conference calls per annual Membership Period with one member of the FFF core team.
4. Email access to a Future-Fit liaison to help with specific queries.
5. Regular email updates and advance notice of forthcoming substantive changes to the FFBB.
6. Access to the Changemakers Community, including the opportunity to discuss ideas and experiences with other Changemakers, to learn from other experts, and to help shape the development of the FFBB.

7. We want every Accredited Advisor to be successful in their use of the FFBB, and from time to time we will look to co-promote your work to the Changemaker Community and on the public website if, at FFL's sole discretion, it is deemed to offer significant new learning opportunities for other FFBB users.

## Future-Fit Logos

In using Future-Fit (FFF, FFBB, Accredited Advisor) Logos you agree to:

1. Ensure that all online uses of the Future-Fit Logos (for example on your website) link directly to your Accredited Advisor profile page on the Future-Fit website.
2. Not alter the form (colours, elements, proportions and orientation) of any Future-Fit Logo. For more information see the accompanying Branding Guidelines provided with the Partners Welcome Pack.

The term "Future-Fit" is always hyphenated and should be capitalized when referring to this community or the state of being Future-Fit. The term "future-fitness" should not be capitalized.

## Accredited Advisor Fee

1. The fee for becoming an Accredited Advisor is:
  - a. £995 per annum for an individual;
  - b. £4,995 per annum for an organization, which includes up to three individual Accredited Advisors.
2. Should an organization wish to accredit more than three employees, each additional Accredited Advisor will incur an additional cost of £995 per annum.

## Data Protection

FFL and FFF will only use the data you provide to enable your accreditation and participation in the Community. For the purposes of the General Data Protection Regulation, FFF will be the data controller and FFL will be a data processor.

Full details of our Privacy Policy can be found here: <http://futurefitbusiness.org/privacy>

## Acceptance of these terms

This document sets out the obligations and expectations of both parties and it is their intention that this should be legally binding.

You agree that you shall indemnify, defend and hold harmless Future-Fit Foundation and any of its subsidiaries and their respective officers, agents, employees and subcontractors against all liabilities, costs, expenses, damages and losses (including without limitation reasonable legal and other professional fees and expenses) suffered or incurred by Future-Fit Foundation and Future-Fit Ltd arising out of or in connection with the supply of your product(s) and service(s) to third-parties in relation to the Future-Fit Business Benchmark.

Organization: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Role: \_\_\_\_\_

Date: \_\_\_\_\_