

# AFS Local Team Handbook

Version 3

July 2018

# Contents

Purpose.....	3
Name of Team .....	3
Membership of LT .....	3
Responsibilities .....	3
Local Team Roles .....	4
Size of Team .....	5
Voluntary Role.....	5
Number of Teams.....	5
Board Ending a LT .....	6
LT Staff Connection.....	7
LT Minutes .....	7
Communication Between AFS and LT .....	8
LT Funds.....	9

## Purpose

AFS Intercultural Programmes (AFS) deeply values and relies on the support of people living in communities around the country to support the activities of AFS. AFS Local Teams (LT) provide a formal structure for volunteers to connect and help deliver AFS activities in their local community.

## Name of Team

The AFS Local Team will be individually identified by the insertion of the area they cover between the words AFS and Team. For example, the Wellington team would be known as AFS Wellington Team.

## Membership of LT

To be a member of a LT you must be a volunteer, have a strong connection with the geographical area covered and be available to attend meetings. Anyone can put their name forward to be part of the LT. In doing so they must have signed the volunteer agreement and have been successfully vetted through the police check policy. Details on any changes in LT membership must be communicated to the National Team.

At point of transition from a Chapter to the LT, the current local committee members will be asked to form the inaugural LT.

## Responsibilities

The responsibilities of the LT will vary by region based on size of the LT and size of the region they are covering. The types of responsibilities could include:

<b>Responsibilities</b>	<b>Activities</b>
Sourcing local volunteers	<ul style="list-style-type: none"><li>• Encouraging others to be part of the AFS network</li><li>• Sharing news on volunteer opportunities</li><li>• Sourcing host families</li></ul>

Running local events and activities	<ul style="list-style-type: none"> <li>• Organising events for local participants to make connections and feel part of the wider AFS network</li> <li>• Hosting events for AFS returnees to share their experience</li> </ul>
Local fundraising for events	<ul style="list-style-type: none"> <li>• Organise fundraisers to support local activities and scholarships for future participants.</li> </ul>
Raising AFS profile in the community	<ul style="list-style-type: none"> <li>• Connecting with schools to share about AFS programmes</li> <li>• Connecting with potential participants, giving presentations on AFS programmes</li> <li>• Hosting an AFS stall at key community events</li> </ul>
Peer support	<ul style="list-style-type: none"> <li>• Offer peer support/mentoring to other volunteers supporting them to be successful and feel connected.</li> </ul>
Intercultural Learning	<ul style="list-style-type: none"> <li>• Trained in intercultural learning and using these skills in the local community.</li> </ul>
Oversight and management local finances	<ul style="list-style-type: none"> <li>• Ensuring adequate finances for running events, managing funds received and accurate recording and accountability of money spent.</li> </ul>

In areas with a large population base the LT may decide to employ casual staff to help fulfil some of these tasks, providing they have the resources to cover the associated costs.

## Local Team Roles

The LT will determine the range of roles required to successfully manage the LT in their area. Consideration should be given to:

- If one person needs to take on the role of Local Co-ordinator or if the tasks shall be shared amongst the team.
- How finances will be managed in line with the finance policies and who will have authority to sign off on expenditure or local fundraising campaigns.
- How often meetings will be held and who will be responsible for coordinating the meeting.
- How any decisions of the team will be recorded.

Each year the LT will review and discuss the roles and determine if any changes are required. At least 50% of current LT members should support any changes.

## Size of Team

The LT should have a minimum of three members.

## Voluntary Role

Being part of a LT is a voluntary role. There will be no payment for time spent on LT activities.

## Number of Teams

At point of establishment of Local Teams there will be a LT for each area where there was a functioning Chapter. This includes:

- List...
- 

A minimum of three volunteers may make an application to form a new LT within their region. Under the following procedures:

### If no LT currently covers their geographic region

- A request to establish a LT form must be completed and sent to the National Team. A minimum of three people must show they are willing to be part of the LT.
- The people interested in forming the LT are encouraged to first speak to neighbouring areas and gain their support to form a new LT.

### If an existing LT currently covers the geographic region

- There may be situations where a current LT wants to split due to a wide geographic coverage or it is serving a large urban population. There must be a minimum of 8 members in the area where they propose to form a new LT.
- Where there is an interest by a minimum of three people to form a new LT, they must first discuss this with the current LT, presenting the reasons for creating a new LT.
- If the groups agree to form a new LT, they should outline their proposal to the National Director including where the new geographical boundaries will lie and any agreement to transfer any existing funds across to the new geographical area. A form is available to support providing the right information.

- The National Director will present the proposal to the Board for consideration, who will have the final say in forming a new LT. Provided local parties have agreed and the minimum membership numbers are met then the Board will not withhold approval.
- Where the LTs do not agree on forming a new LT then in the first instance it is encouraged for the LTs to resolve differences. Where this is not possible a case may be presented. The Board will:
  - Request both parties side of the story;
  - Work with both parties themselves or appoint a mediator to assist with resolving the dispute.

### Winding up a LT

In some situations, a LT may decide they no longer wish to continue and are unable to maintain the minimum number of members interested in being part of the LT. In this case the LT is to:

- Discuss with the National Director, or the National Director's representative, the issues they are facing and see if any solutions can be found to see the ongoing operation of the LT.
- If this is unsuccessful then conversations will be arranged with bordering LTs to determine their interest in covering the additional geographical area. If another LT is interested in covering the area, then this will be formalised in writing between the parties and presented to the Board for sign off.

## **Board Ending a LT**

The LT must comply with the obligations of a LT as outlined in clause 6(1)(c) of the Constitution. These obligations are as follows:

- The Constitution constitutes an expression of good faith between each LT and AFS and they are each bound by the Terms of the Constitution;
- They shall recognise and observe the Constitution and the Local Group Handbook;
- The Constitution is made in the pursuit of a common object, namely the mutual and collective benefit of AFS;
- Each Local Team shall cooperate with the Governance Team, National Team and all other Local Teams in pursuit of the purposes of AFS and in compliance with the Constitution.

- Only use such trademarks, logo and other livery as agreed with the National Team.
- Not do or permit to be done any act that might adversely affect or derogate from the standards, quality and reputation of AFS in New Zealand and internationally.

If the Governance Team find the LT does not meet its obligations, then they will follow the disputes policy outlined in the Governance Team Handbook. This may result in that LT winding up and all rights removed.

A LT that ceases to be a LT shall: -

- forfeit all rights in and claims upon AFS and its property, and
- shall not use any property of AFS including intellectual property, and
- will take the necessary steps to cease using the AFS name and logo.

## **LT Staff Connection**

The National Team will have a responsibility to keep in touch with LTs and ensure the LT is well-informed about activities taking place in the local community. AFS will ensure staffing support is available to LTs to support with:

- Volunteer support and recognition
- Updates on programme participants
- Updates on programme offerings
- Tools to support accessing and connecting with volunteers in the local area.
- Clarity on any procedures they need to follow
- Access to relevant training to support local activities
- Tips on local fundraising campaigns

## **LT Minutes**

Any decision outlined below must be recorded:

- If funds need to be used document the amount of funds, for what costs and who is authorised to action spending the funds.

- If a fundraising campaign will be run details on the campaign, associated costs and how funds received will be tracked and banked.
- Any formal feedback/commentary/complaint the LT wants to give to the Governance Team.
- LT input on strategy.
- Changes to the area covered by a LT through formation of a new LT or amalgamation of a LT.
- Decision to wind up a LT.

The record should show who was involved in the discussion and requires two LT members to sign the written document as a formal record of what was agreed.

It is over to the LT if they wish to create any further documentation on agreed local actions. It is not necessary for a LT to keep any further minutes of their meetings.

## Communication Across Teams

AFS commits to actively engaging in two-way communication between LT and AFS.

In the first instance, this will be supported through the National Team who will support LT in their roles through sharing of information, best practice and keeping them up-to-date with latest activities.

To encourage the sharing of ideas and learning across LT online communication channels will be used to encourage sharing of information and experiences. The purpose of this cross-team communication is to:

- Share what activities each LT has been doing;
- Learn from and support others;
- For the National Team and Governance Team to gain a deeper understanding of challenges people are seeing/dealing with at the local level.

Every year a national annual meeting will take place. The annual meeting will be an opportunity to hear how AFS has performed in the prior year and discuss future direction.

# LT Funds

## **Accountability**

Local Teams are jointly responsible for ensuring Local Team funds are utilised for the purpose of achieving or promoting the objects of AFS. All expenditure, income, assets and liabilities of Local Teams shall be recorded in an appropriate manner and, at least, one person on the Local Team shall maintain oversight and ensure the accounting guidelines which are laid down by the Board are applied.

## **Control of funds and investment**

All monies received by any Local Team form part of the funds of AFS and must be banked in an account approved by the Board for the organisation. Where a Local Team was previously a functioning Chapter, prior to the structure changes that took place on 25 August 2018, they will have a bank account maintained in the Local Teams name. The Local Team will have a minimum of two signatories in the Local Team who can authorise payments.

When a new Local Team forms, they cannot immediately operate their own bank account and finances will be initially managed through the Nation team. Over time the new team may in agreement with the national team have a local team bank account established and managed as this Handbook.

The funds of each individual Local Team not immediately required for carrying out the objectives of the Society may be invested upon fixed term deposit at the approved bank. Local Teams are strongly encouraged to invest surplus funds with the AFS Educational Trust as the Trust funds are actively managed to maximise the return on investment, which is then used for scholarships and grants.

The Finance Manager will support the Local Team to make the right decision regarding investment and organise the transfer of funds from the current account to the required investment. Any investment other than those described above shall require the prior written approval of the Board.

## **Recording of Financial Transactions**

Local Teams must produce evidence of all transactions by supplying valid supporting documents, to the National Team, preferably electronically. Within 5 days of the transaction the documentation must be supplied.

## **Purpose of purchases**

All purchases made by Local Teams are to be for AFS business purposes, permitted under these policy statements and be in the interests of the Society. No purchases shall be made for private purposes.

*For example:*

*A payment of compensation to a sending family of an early returned student would not be in the interests of the Society as the early return decision would have been made based on AFS rules. In these cases, National Office and International deal with the families' concerns and any compensation proceedings.*

## **General Expenses**

Local Teams must agree in advance on approved expenditure and document this in their minutes.

Local Teams **without** a bank account cannot commit to spend more than they have raised, unless approved by the National Director.

## **Asset purchases**

Local Teams cannot purchase any assets that have an associated ongoing liability.

For example: a motor vehicle (ongoing liabilities in the form of insurance and motor vehicle compliance costs); a property investment (ongoing liabilities in the form of insurance and rates).

A Local Team operating an approved bank account can purchase minor assets (with no associated ongoing liability) with a value as per the delegated authority. Approval

is required from AFS Finance Manager for the purchase of any asset exceeding delegated authority.

A Local Team without a bank account must seek approval from the authorised National Team Member for purchase of a minor asset.

## **Contracts**

Local Teams with an approved bank account can enter into contracts related to the holding of camps and/or transportation to camps

For example:

- Motor vehicle rental contracts; and
- Venue contracts.

Local teams without a bank account must first seek approval for the expenditure and national office will either enter the contract directly and organise payment.

Local Teams are not permitted to enter into other contracts.

For example:

- Photocopier leases;
- Corporate memberships; or
- Timeshare accommodation.

## **Liabilities**

Local Teams are not permitted to borrow funds or enter any other liabilities other than those allowed for under general expenses.

## **Income**

Local Team income may be obtained from the following without written approval:

- Interest on bank accounts and investments;
- Donations;
- Locally run raffle ticket sales commission, with a total prize value not to exceed \$500;

- Other fundraising activities which comply with permitted fundraising activities;
- National office credits for hosting, sending and orientation;
- Camp payments from National office;
- Camp payments from participants; and
- Sales of AFS Merchandise.

Local Teams are to obtain written National Director approval for all other income producing activities.

### **Permitted Fundraising Activities**

Fundraising activities may be undertaken without written National Director approval if:

- The fundraising activity is appropriate for and unlikely to offend or make uncomfortable any member of the Local Team and participant in the fundraising activity, having regard to their age, cultural background and individual circumstances;
- The fundraising activity is not and does not have the appearance of being inconsistent with the standards, ideals and objects of AFS;
- Where the fundraising activity contains an element of chance, the activity would be considered a “Class 1 Gambling” activity by the Department of Internal Affairs and all other Department of Internal Affairs rules are complied with, including any restriction on the total value of prizes and turnover from the fundraising activity. The fundraising proceeds are to be used for the benefit of the Society and not an individual (e.g. not for an individual student’s fees); and
- The fundraising activity complies with all other relevant laws and will not adversely affect the reputation of the Local Team or AFS.

### **Forms to be prepared**

- Request to establish LT
- Written confirmation of decisions at LT
- Role Description