



# Fundraising Group Coordinator welcome and induction checklist

## Welcome!

And thank you, we hope you enjoy your volunteering with us.

## How to use this checklist

This checklist gives you some pointers for settling into your role and finding out about our work, the policies and resources in place to support you.

You can tick off each step as you go along. There's space to write any questions you might have as you complete it. The 'Sources of support' below shows who to ask for more information.

We recommend you complete your induction as soon as you can, particularly resources listed under 'Welcome' and 'My mandatory learning'. This checklist will help you get started in your role but how long it will take depends on your availability.

### Key



Action



Top tips

## Sources of support

You lead the Coordinating team. Formed with the Finance Volunteer and at least one other volunteer, you have a shared responsibility for the group's finances, planning, making decisions and problem-solving.



Your local fundraising staff contact is here to support you and answer questions:

[volunteers.mssociety.org.uk/node/1800](https://volunteers.mssociety.org.uk/node/1800)



The Supporter Care Team is your point of contact for queries to MS Society departments. They can signpost you to the right person:

[volunteers.mssociety.org.uk/supporter-care-team](https://volunteers.mssociety.org.uk/supporter-care-team)








Speaking to volunteers from other groups can be another source of support. This is something you could organise yourself or ask your fundraising staff contact to do for you.



Other staff who can support you are listed on our volunteer website:



[volunteers.mssociety.org.uk/staff-support](https://volunteers.mssociety.org.uk/staff-support)





## Welcome


Aim	Methods	Any questions?
<input type="checkbox"/> I'm clear about what I'll be doing	 Talk through your role and make sure you understand what you'll be doing: <a href="https://volunteers.mssociety.org.uk/fundraising-group-coordinator">volunteers.mssociety.org.uk/fundraising-group-coordinator</a>   Refer to your brief for more information.	
<input type="checkbox"/> I'm aware of what learning and development opportunities are available	 Discuss with the person who recruited you what skills you would like to develop and what your priorities are for induction.	
<input type="checkbox"/> I can talk about what it's like to volunteer for us	 Watch our <a href="#">Welcome Video</a> and read our <a href="#">Welcome booklet</a> : <a href="https://volunteers.mssociety.org.uk/welcome-ms-society">volunteers.mssociety.org.uk/welcome-ms-society</a>	
<input type="checkbox"/> I know what MS is, and I am able to explain how it affects different people in different ways	<p>Everyone experiences MS differently. We have listened to what people affected by MS have told us. Find out more.</p>  Watch the <a href="#">What is MS Video</a> and read about it on the MS Society website: <a href="https://mssociety.org.uk/what-is-ms">mssociety.org.uk/what-is-ms</a>	



Aim	Methods	Any questions?
<input type="checkbox"/> I know what we're striving to achieve	 Watch <b>Our Strategy Video</b> to find out more about the organisational goals we are all working to: <a href="https://mssociety.org.uk/about-us/our-strategy">mssociety.org.uk/about-us/our-strategy</a>	
<input type="checkbox"/> I'm aware of our Code of Conduct and how to represent the MS Society	 Visit <b>Representing the MS Society</b> on our volunteer website: <a href="https://volunteers.mssociety.org.uk/representing-ms-society">volunteers.mssociety.org.uk/representing-ms-society</a>	
<input type="checkbox"/> I can find the policies in place to support us	 To find out the range of policies we have and what they cover, visit <b>Policies and documents</b> : <a href="https://volunteers.mssociety.org.uk/policies">volunteers.mssociety.org.uk/policies</a>   See what policies you must read and understand as part of your role in 'My mandatory learning' below.	

## My mandatory learning


Aim	Methods	Any question?
<input type="checkbox"/> I know how volunteers, including myself, can claim expenses and how to process expenses	 <p>Read our <b>Expenses policy</b> and identify how volunteers should claim expenses and what for.</p> <p>Policy:  <a href="https://volunteers.mssociety.org.uk/resources/1855">volunteers.mssociety.org.uk/resources/1855</a></p> <p>Expenses claim form:  <a href="https://volunteers.mssociety.org.uk/resources/376">volunteers.mssociety.org.uk/resources/376</a></p>	
<input type="checkbox"/> I can apply fundraising standards to our fundraising activities	<p>We're committed to ensuring all fundraising activities organised on behalf of or in aid of the MS Society meet external fundraising standards and legal requirements.</p>  <p>Find out about fundraising standards in our online presentation. Use our <b>Fundraising standards action plan</b>. Access these on <b>Our fundraising standards</b>:  <a href="https://volunteers.mssociety.org.uk/our-fundraising-standards">volunteers.mssociety.org.uk/our-fundraising-standards</a></p>	

Aim	Methods	Any question?
<input type="checkbox"/> I can access and handle everyone's data so their personal details are kept safe	<p>You need to make sure the personal data you handle is processed in line with the Data Protection Act.</p> <p> Discuss how to handle data safely and securely, and only for the purpose(s) agreed with the Coordinating Team. Read the <a href="#">MS Society data protection policy</a> and <a href="#">Handling data</a> for more information.</p> <p>Policy: <a href="https://volunteers.mssociety.org.uk/resources/861">volunteers.mssociety.org.uk/resources/861</a></p> <p>Handling data: <a href="https://volunteers.mssociety.org.uk/handling-data">volunteers.mssociety.org.uk/handling-data</a></p> <p> Watch out for our upcoming data protection eLearning.</p>	
<input type="checkbox"/> I know how to access and use the Portal	<p>The Portal is an online platform that enables you to manage your volunteers' data.</p> <p> Find out about the Portal: <a href="https://volunteers.mssociety.org.uk/portal">volunteers.mssociety.org.uk/portal</a></p> <p> You'll need to complete our data protection course to access the Portal</p>	



Aim	Methods	Any question?
<p><input type="checkbox"/> I'm aware I'm responsible for the health and safety of the group and visitors. I can use our risk management systems and our events guidance</p>	<p>We're committed to providing a safe environment for everyone. You must be familiar with our health and safety policy, our events risk management systems and our events guidance.</p> <p> Discuss and plan with your Coordinating Team how to implement any actions and complete all checks. Read <b>Health and safety basics</b> and <b>Our events risk management system</b> for more information.</p> <p>Health and safety basics (including policy): <a href="http://volunteers.mssociety.org.uk/health-and-safety-basics">volunteers.mssociety.org.uk/health-and-safety-basics</a></p> <p>Our events risk management systems and our events guidance: <a href="http://volunteers.mssociety.org.uk/events-risk-system">volunteers.mssociety.org.uk/events-risk-system</a></p>	

Aim	Methods	Any question?
<input type="checkbox"/> I understand and agree with our commitment to treating others fairly, according to their needs	<p>We're committed to offering services and activities that are relevant, inclusive and accessible to everyone, preventing any form of discrimination.</p> <p> Discuss with the Coordinating Team how we can meet our commitment. Read our <a href="#">Equal opportunities and inclusion policy</a> and our <a href="#">Diversity position statement</a> for more information.</p> <p>Equality opportunities and inclusion policy: <a href="https://volunteers.mssociety.org.uk/resources/366">volunteers.mssociety.org.uk/resources/366</a></p> <p>Diversity position statement: <a href="https://volunteers.mssociety.org.uk/resources/367">volunteers.mssociety.org.uk/resources/367</a></p>	
<input type="checkbox"/> I can keep myself safe when volunteering on my own	<p>You must make sure you take every precaution when volunteering on your own.</p> <p> Find out about the range of ways to keep yourself safe. Read <a href="#">Lone volunteering</a> on our volunteer website. It includes our <a href="#">Lone working and volunteering policy</a> and guidance. <a href="https://volunteers.mssociety.org.uk/lone-volunteering">volunteers.mssociety.org.uk/lone-volunteering</a></p>	





<input type="checkbox"/> I know how to raise a concern about malpractice, such as fraud or mismanagement	<p>Malpractice is rare but any concerns must be reported and you need to know our procedure for whistleblowing.</p>  Find out what malpractice includes, and how to decide what is a concern and how to raise it. Read our <a href="#">Whistleblowing policy</a> for more information: <a href="https://volunteers.mssociety.org.uk/resources/865">volunteers.mssociety.org.uk/resources/865</a>	
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## Induction to my role and responsibilities





Aim	Methods	Any questions?
<input type="checkbox"/> I've had an opportunity to find out about my role	<p>Where possible, your fundraising staff contact will aim to put you in touch with a Fundraising Group Coordinator from another area.</p>	
<input type="checkbox"/> I've discussed my vision for the group with my fundraising staff contact and created a shared vision with the Coordinating Team	 Meet with your Coordinating Team and fundraising staff contact to discuss your vision and ideas.  You should organise regular meetings to plan your group's activities and plans.	



Aim	Methods	Any questions?
<input type="checkbox"/> I've discussed individual roles, skills and ideas for the group with individual members of the team	<p>  Meet your team and find out about their personalised roles, current skills and those they'd like to develop. Also the ideas they have for the group's vision:  <a href="http://volunteers.mssociety.org.uk/group-roles">volunteers.mssociety.org.uk/group-roles</a> </p> <p>  Your fundraising staff contact can give you more information and support about recruiting other volunteers.         </p> <p>  Information on recruiting a fundraising team is also available on our volunteer website:  <a href="http://volunteers.mssociety.org.uk/recruiting-fundraising-team">volunteers.mssociety.org.uk/recruiting-fundraising-team</a> </p>	

<input type="checkbox"/> I am set up as an account signatory	 <p>With the rest of the Coordinating Team, fill in the <b>Global Banking Authority mandate form</b>:  <a href="http://volunteers.mssociety.org.uk/resources/204">volunteers.mssociety.org.uk/resources/204</a></p>  <p>You'll need to fill in and sign the <b>Signatory declaration and Change of statement address form</b>:  <a href="http://volunteers.mssociety.org.uk/resources/1143">volunteers.mssociety.org.uk/resources/1143</a>  <a href="http://volunteers.mssociety.org.uk/resources/296">volunteers.mssociety.org.uk/resources/296</a></p>	
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### Learn as you go

Aim	Methods	Any questions?
<input type="checkbox"/> I can oversee the group's finances	 <p>Discuss with the Coordinating Team your responsibilities for finances. Refer to our <b>Finance basics for Coordinating teams</b>:  <a href="http://volunteers.mssociety.org.uk/resources/1902">volunteers.mssociety.org.uk/resources/1902</a></p>	

Aim	Methods	Any questions?
<input type="checkbox"/> I can plan and organise different types of fundraising activities	 Discuss with the Coordinating Team the range of fundraising activities you'll organise. Read <b>Ways to fundraise</b> to start generating ideas: <a href="https://volunteers.mssociety.org.uk/ways-fundraise">volunteers.mssociety.org.uk/ways-fundraise</a>	
<input type="checkbox"/> I know how to access the group email	 Find out how to by visiting <b>The MS Society email</b> : <a href="https://volunteers.mssociety.org.uk/MS-Society-email">volunteers.mssociety.org.uk/MS-Society-email</a>	
<input type="checkbox"/> I know how to use our brand and where to find templates	 Visit <b>Using our brand</b> : <a href="https://volunteers.mssociety.org.uk/using-our-brand">volunteers.mssociety.org.uk/using-our-brand</a>   This page includes information and a user guide to Web to Print, our online tool for creating newsletters, posters and stationary.	

<input type="checkbox"/> I can apply our social media guidelines and know where to find social images available	 Visit <a href="https://volunteers.mssociety.org.uk/social-media">Using social media</a> for guidance: <a href="https://volunteers.mssociety.org.uk/social-media">volunteers.mssociety.org.uk/social-media</a>   Use our social media images: <a href="https://volunteers.mssociety.org.uk/social-media-images">volunteers.mssociety.org.uk/social-media-images</a>	
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If you have any feedback about this checklist, please email [volunteering@mssociety.org.uk](mailto:volunteering@mssociety.org.uk)

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