



Finance Volunteer 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 task 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 takes to complete will depend on your availability.

Key



Action



Top tips


Sources of support

Along with the Group Coordinator and at least one other volunteer, you form part of the Coordinating Team. As such, you have a shared responsibility for the group's finances, planning services and activities, making decisions and dealing with problems.


Meeting the rest of your Coordinating Team will give you an insight into what the group does, what activities and services are currently offering and what they would like to develop in future.




The Finance Support Team is your staff contact for questions relating to your group's finances and control over those funds. Shortly after you start, you'll receive a welcome email from the team. You can reach them at financesupport@mssociety.org.uk


 Your Local Networks Officer (LNO) supports the development of the group and can help with developing new services or managing reserves:

volunteers.mssociety.org.uk/local-networks-team


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

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, ask your LNO to support you with or by attending meetings organised by your LNO which bring together other groups and volunteers.

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

volunteers.mssociety.org.uk/staff-contacts





 **Managing your finances** offers guidance on online accounting, managing your groups' finances and following the MS Society's financial rules and policies:




<https://volunteers.mssociety.org.uk/finances>

 Our **Group Handbook** offers guidance on the practices and procedure groups should follow:



volunteers.mssociety.org.uk/group-handbook






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. | |
| <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 as part of your role and what your key priorities are for induction. | |
| <input type="checkbox"/> I can talk about what it's like to volunteer for us |  Watch our Welcome Video and read our Welcome booklet : volunteers.mssociety.org.uk/welcome-ms-society | |
| <input type="checkbox"/> I know what MS is, and I am able to explain how it affects different people in different ways | Everyone experiences MS differently. We have listened to what people affected by MS have told us. Find out more.  Watch the What is MS Video and read about it on the MS Society website: mssociety.org.uk/what-is-ms | |


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

My mandatory learning



| Aim | Methods | Any questions? |
|--|---|----------------|
| <input type="checkbox"/> I know how volunteers, including myself, can claim expenses and how to process expenses |  <p>Read our Expenses policy and identify how volunteers should claim expenses and what for.</p> <p>Policy: volunteers.mssociety.org.uk/resources/1855</p> <p>Expenses claim form: volunteers.mssociety.org.uk/resources/376</p> | |
| <input type="checkbox"/> I know how to log in and use Online Accounting | <p>You must use Online Accounting, our simple to use web-based accounting system for groups. It enables you to record accounting transactions and produce financial reports.</p> <p>Shortly after you start, the Finance Support Team will send you a user name and password for you to log in: branchaccount.mssociety.org.uk/branchaccounting/openpages/login.aspx</p>  <p>Read the Online Accounting user guide: branchaccount.mssociety.org.uk/branchaccounting/help/UserGuide.pdf</p> | |






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| | <p> Watch the demonstration video: youtube.com/watch?v=iNWeZdvZpBo</p> <p> Book a one-to-one session with a member of the Finance Support Team for a phone tutorial.</p> | |
| <p><input type="checkbox"/> I know how to access and use the Portal</p> | <p>The Portal is an online platform that enables your group to access membership and volunteers' data, and share information about the services and activities you deliver.</p> <p> Find out about the Portal: volunteers.mssociety.org.uk/portal</p> <p> You need to complete our data protection course to access the Portal</p> | |
| <p><input type="checkbox"/> I can access and handle volunteers and members' personal information</p> | <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 MS Society data protection policy and Handling data for more</p> | |




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| | <p>information.</p> <p>Policy: volunteers.mssociety.org.uk/resources/861</p> <p>Handling data: volunteers.mssociety.org.uk/handling-data</p> <p> Watch out for our upcoming data protection eLearning.</p> | |
| <p><input type="checkbox"/> I understand and agree with our commitment to treating others fairly, according to their needs</p> | <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 Equal opportunities and inclusion policy and our Diversity position statement for more information.</p> <p>Equality opportunities and inclusion policy: volunteers.mssociety.org.uk/resources/366</p> <p>Diversity position statement: volunteers.mssociety.org.uk/resources/367</p> | |

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| <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 Whistleblowing policy for more information: volunteers.mssociety.org.uk/resources/865 | |
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Induction to my role

| Aim | Methods | Any questions? |
|---|--|----------------|
| <input type="checkbox"/> I've had an opportunity to find out about my role and the group's finances |  Where possible, your LNO will aim to put you in touch with the current or previous Finance Volunteer(s). Alternatively your LNO or the Finance Support Team can try to put you in touch with a Finance Volunteer from a neighbouring group. | |
| <input type="checkbox"/> I've discussed my ideas with the Coordinating Team |  Meet with your Coordinating Team to discuss your ideas. | |

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| <input type="checkbox"/> I know of my and my group's responsibility for the group's finances |  <p>When you start, visit Managing your finances to check you're meeting your responsibilities. Discuss with the Coordinating Team: volunteers.mssociety.org.uk/finances</p>  <p>See Learn as you go for more resources.</p> | |
| <input type="checkbox"/> I am set up as an account signatory |  <p>With the rest of the Coordinating Team, fill in the Global Banking Authority mandate form: volunteers.mssociety.org.uk/resources/204</p>  <p>You'll need to fill in and sign the Signatory declaration and Change of statement address form: volunteers.mssociety.org.uk/resources/1143 volunteers.mssociety.org.uk/resources/296</p> | |
| <input type="checkbox"/> I'm aware of the importance of checking with the Coordinating Team that all financial controls are in place |  <p>Use the Internal Financial Controls Checklist to check all financial controls are in place: volunteers.mssociety.org.uk/resources/1349</p> | |

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| <input type="checkbox"/> I am aware of the grants we offer and related processes – for groups that award grants |  Find out about our National grant funds on our volunteer website and familiarise yourself with our processes: volunteers.mssociety.org.uk/national-grant-funds  Discuss with the Coordinating Team if you offer grants locally. | |
| <input type="checkbox"/> I know how to keep up to date with MS news relevant to my role |  Read Teamspirit magazine. It'll be sent to you or you can access all issues online: volunteers.mssociety.org.uk/teamspirit | |

Learn as you go

| Aim | Methods | Any questions? |
|---|---|----------------|
| <input type="checkbox"/> I am confident using our Quality Standards and know where to find a template of our Service Level Agreements (SLA) |  Discuss with your Coordinating Team whether and how you might use quality standards. Visit Quality Standards for more information: volunteers.mssociety.org.uk/quality-standards | |

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