MS Society
Group Handbook

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Part A: Group basics

A1: Introduction and overview

In this section

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1. About us

There are more than 100,000 people with multiple sclerosis (MS) in the UK. Hundreds of thousands more have a friend or family member with the condition. We are the UK's biggest organisation dedicated to supporting people with MS and those who care about them.

We have 35,000 members and over 5,500 highly dedicated volunteers like you working in partnership with committed staff. We are governed by an elected board of voluntary trustees, many of whom are personally affected by MS.

1.1. What we are working towards

Our ultimate aim is to stop MS.

Our vision is 'a world free from the effects of MS' and our mission is 'transforming lives, stopping MS.'

Our organisational goals

These are our long-term aspirational goals, guiding everything we do.

1. Effective treatments and preventing MS
2. People living well with MS
3. Connected communities, powerful voices

We want to build on all the progress we’ve made so far – in MS research, through the services we provide and by continuing to campaign for change on the things that matter most to people living with MS.

Everything we do, we do to make progress towards our goals. To achieve them, we’ll need to be an effective and efficient organisation, ensuring that we’ve got the resources and profile we need.

This handbook sets out the principles and procedures that must be followed by MS Society volunteer-led groups across the UK – to make sure we act as one organisation in working towards our goals.

1.2. How we work

There are common themes that guide the way we work and apply to everything we do – locally, nationally and internationally.

- As an organisation we work alongside people affected by MS, and ensure they are at the heart of everything we do.

- We work with other organisations and key individuals who share our goals, knowing that we can become more effective through working in partnership.

- Our resources are finite, so we prioritise our work and focus on the areas where we can have the greatest impact.

- We are clear about what we want to achieve and the difference we want to make, and seek to measure the impact our activities have.

- We are inclusive, and seek to support everyone affected by MS from all communities and walks of life, regardless of whether they are members of the MS Society.

- We are a UK-wide organisation working towards the same goals across England, Northern Ireland, Scotland and Wales, but we tailor our approach to UK, national or local contexts as required.

Together, we are strong enough to stop MS

Our strength comes from:

- Our open and democratic processes, such as our Annual General Meeting (AGM) and 'one member, one vote'
- Our transparent and accountable ways of working
- Our shared core values that inform all our work
- Our staff and volunteers working alongside each other

Find out more Learn about our governance structure at Our People on the MS Society website, or ask the Supporter Care Team for help.

2. Our volunteer-led groups

Our network of volunteer-led groups is one of our major strengths. Our groups bring people affected by MS together locally, supporting them to be physically active, have access to information, get appropriate emotional support and feel part of a community.

Our volunteers also influence national and local services, and raise vital funds to support our shared goals.

Find out more See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

Our agreed local terminology

When we talk generally about our volunteer-led groups, we use the term 'MS Society groups' or 'our groups'. When we refer to a specific group, we say 'MS Society + group name'. For example, 'MS Society Anytown'.

We want you to use our agreed terminology when you talk about your own, and other MS Society groups.

Find out more See C3: Your Coordinating Team for guidance on how your group should operate.

3. Group Handbook

This handbook is for all MS Society groups that provide an opportunity to meet together every so often, help raise funds for our work, or deliver services and activities for people affected by MS.

Group Handbook contents

Part A: Group basics

Part B: If your group handles money and provides services and activities

Part C: Running your group

Part D: Optional additional services

Appendices

- X4: MS Society financial rules for groups
- X5: Code of Fundraising Practice in summary

3.1. What does the Group Handbook include?

- It describes the practices and procedures your group should follow
- It distinguishes between 'must do' and 'good to' practices
- It outlines key background information
- It points to further support available to our volunteers and groups:
    - On the volunteer website
    - From a staff member or team

3.2. Volunteer website resource index

Throughout the Group Handbook you'll find links to our online tools and written resources available on the volunteer website.

Appendix 1: Volunteer website resource index lists these links in alphabetical order – click on any link to be taken to that resource.

You can also ask our Supporter Care Team to send you a printed copy of any written resource.

For more on how our Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

3.3. Version control

The Group Handbook on our volunteer website will always be the current version and we'll tell you when we've made changes in Teamspirit - our bi-monthly volunteer newsletter.

Teamspirit is sent to your shared group MS Society email address and directly to members of your Coordinating Team. It is available online for everyone to read.

For current and back issues, see Teamspirit on our volunteer website, or ask the Supporter Care Team to send you printed copies.

We've also added a version control box (like the one below) at the end of each section so you'll know when it was last reviewed, and who is responsible for the content.

Group Handbook A1: Introduction and overview v3.3	
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A2: Requirements, support, tools and resources

In this section

MS Society groups may provide an opportunity to meet together every so often, they may want to help raise funds for us, or they may deliver services and activities for people affected by multiple sclerosis (MS).

Whatever your group offers, you will use the same systems, be supported by a key staff contact, and have access to the online tools and written resources available on our volunteer website.

1. MS Society group requirements

All MS Society groups must meet our basic requirements, and if you handle money and provide services and activities for people affected by MS, there are additional requirements we expect to be met.

1.1. All MS Society groups must:

- Respect our values, and ensure that all volunteers follow our Code of Conduct

- Follow our policies and rules, ensure that everything you do is safe, and manage personal data appropriately

- Keep us informed of your activities

1.2. MS Society groups that handle money and provide services and activities must:

- Be available to all people affected by MS in the area, be easy to contact, regularly communicate with members, and ensure information about MS and MS Society services and activities is available to everyone in your community

- Manage your finances appropriately

- Have volunteers responsible for planning and delivering activities, and managing finances

- As a minimum, raise enough funds to cover the cost of your activities

- All services and activities you provide must:

  - Align with our strategy and meet the needs of people affected by MS
  - Be available to the whole MS community you serve
  - Be safe and high quality

2. Optional additional services

Although they are not requirements for MS Society groups, we know that certain services have a positive impact on people affected by MS, and we encourage our groups to provide them. These services are:

- MS Support
- Awarding grants
- Campaigning
- Fundraising (beyond the amount required to support your activities)

Where you have the capacity to deliver these, we will offer support and guidance to help your group to do so.

Find out more

See D1: Offering MS Support for our priorities, ways of working and how we help our groups to offer a local MS Support service.

3. Sources of support

All group requirements and optional additional services are supported by a staff member or team. This is usually your Local Networks Officer or the Supporter Care Team, but occasionally it's someone else.

You'll find details of staff support throughout the Group Handbook.

3.1. Your Local Networks Officer

If your group delivers services and activities, your Local Networks Officer (LNO) is your main staff contact. Your LNO can work with you to help extend your reach, raise awareness of MS locally and offer excellent services to people affected by MS. Contact your LNO for support with:

Processes

- Advice on organising events
- Volunteer recruitment

Service development

- Business planning and legacy spend planning
- Developing new services
- Identifying local need
- Raising awareness and extending the reach of our services

Volunteering

- Service user issues
- Support with organising your team of volunteers

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

3.2. Supporter Care Team

The Supporter Care Team is your point of contact for enquiries about most MS Society departments.

Supporter Care Team
supportercare@mssociety.org.uk
Tel: 0300 500 8084

Contact our Supporter Care Team for help with:

Administrative support

- Health and safety enquiries
- MS Society email support
- Online Shop orders
- Portal support

- Grant application form requests and basic queries
- Web to Print support
- Website navigation

Fundraising

- National fundraising opportunities, such as Cake Break
- Fundraising location concerns
- Licence queries
- Store collection details

Membership

- Membership data and enquiries
- Changes of address
- Processing new members and renewals

Policy support

- Your call will be directed to the appropriate person

Volunteering

- Changes to your volunteer team
- Volunteer learning and resource information
- Who needs a disclosure check

For more on how our Supporter Care Team can help you, see Supporter Care Team on the volunteer website.

3.3. Finance Support Team

All new Finance Volunteers receive a phone call from our Finance Support Team to introduce you to the ways we can help you.

The Finance Support Team also sets up your Online Accounting log in (see 'Online tools and written resources' below) and is available to all group volunteers to answer questions about group finances.

Finance Support Team
financesupport@mssociety.org.uk
Tel: 0131 335 4078

3.4. Support and Wellbeing Team

Our Support and Wellbeing Team is here to offer telephone and email support to volunteers whose role may involve dealing with difficult or distressing situations.

If you are a Group Coordinator, Lead Support Volunteer or Support Volunteer, we will invite you to join our regular telephone sessions to talk confidentially about your role, raise any concerns, and share experiences with others who offer a similar service.

Support and Wellbeing Team
supportwellbeing@mssociety.org.uk
Tel: 0300 500 8084

For more information, see Support and Wellbeing Team on our volunteer website, or ask the Supporter Care Team for help.

4. Online tools and written resources

All MS Society group requirements and optional additional services are supported by the online tools and written resources available on our volunteer website.

Online tools are digital platforms that enable you to do something, and written resources explain why and what you should do.

You'll find links to our online tools and written resources in Appendix 1: Volunteer website resource index and throughout this handbook.

4.1. MS Society email

All volunteers who communicate by email on our behalf must use MS Society email to do so.

Your group has a shared MS Society email address, and we are rolling out individual email addresses for volunteers who perform certain tasks or hold specific roles.

MS Society email in the Group Handbook

- A6: Handling data
- B1: Availability, contact and communication
- B2: Using our brand
- B4: Managing your finances
- C1: Volunteering with us

To request your individual MS Society email account, log in or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

4.2. Online Accounting

If your group handles money, you must use our Online Accounting system to report on your financial transactions.

Online Accounting in the Group Handbook

- B4: Managing your finances
- C3: Your Coordinating Team
- C4: Membership administration

To request access to Online Accounting, log in or get support, see Using Online Accounting on our volunteer website, or ask the Finance Support Team for help.

4.3. Online Recruitment

Online Recruitment enables our staff and volunteers to manage the entire recruitment process online, from tailoring your advertisement and promoting your vacancy, to confirming a successful candidate in a role.

Online Recruitment in the Group Handbook

- C1: Volunteering with us
- C3: Your Coordinating Team

To request your Online Recruitment account, log in or get support, see Using Online Recruitment on our volunteer website, or ask the Volunteering Team for help.

4.4. Online Shop

Our Online Shop stocks both MS Society information resources and branded materials.

Online Shop in the Group Handbook

- B2: Using our brand
- B3: Giving information
- B5: Fundraising
- C1: Volunteering with us

To request your Online Shop account, log in or get support, see Using our Online Shop on our volunteer website, or ask the Supporter Care Team for help.

4.5. Portal

Our Portal enables your group to hold and access contact information for members, coordinate your volunteer team, and promote the services and activities you offer on our website.

Portal in the Group Handbook

- A5: Health, safety and wellbeing
- A6: Handling data
- A7: Keeping in touch
- B1: Availability, contact and communication
- B4: Managing your finances
- B6: Planning and delivering quality services and activities
- C1: Volunteering with us
- C2: Disclosure checks
- C4: Membership administration
- D1: Offering MS Support

To request access to the Portal, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

4.6. Web to Print

Web to Print supports our groups to design and produce branded newsletters, stationery and promotional items.

Web to Print in the Group Handbook

- A5: Health, safety and wellbeing
- B1: Availability, contact and communication
- B2: Using our brand
- B3: Giving information
- B4: Managing your finances
- C1: Volunteering with us

To request your Web to Print account, log in or get support, see Using Web to Print on our volunteer website, or ask the Supporter Care Team for help.

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A3: Our values and how we deal with problems

In this section

1. Our organisational values
2. Our Code of Conduct
3. Equality, diversity and inclusion
4. Dealing with problems

1. Our organisational values

Our organisational values represent who we are. Together, we are strong enough to stop multiple sclerosis (MS).

Bold

We are brave and innovative. We are not afraid to take risks and speak out, even when it is not easy. We are pioneering and dynamic in our approach to achieving our goals. We will campaign and push boundaries, and will not give up until we have beaten MS.

Expert

As a community, we understand MS better than anyone else. Our work is built on the rich and varied expertise and experience of people affected by MS, our staff, volunteers, professionals and scientists, to improve the lives of people affected by MS.

Ambitious

We do not accept the status quo. We set high standards and work hard to reach them, driving real change. We push the boundaries and are positive about beating MS.

Together

We achieve success by working with the whole MS community and others who can help us achieve our goals. We are collaborative and inclusive in our approach to succeed in delivering our goals. Everything we do shows we support and care about each other.

2. Our Code of Conduct

Our Code of Conduct is a statement of the values we uphold in all our activities.

Everybody who volunteers for, or is employed by the MS Society must take personal responsibility for following this code, as must all those connected with, or acting on our behalf.

Find out more

See our Code of Conduct on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

3. Equality, diversity and inclusion

We have a detailed Equality Opportunities and Inclusion Policy in line with the Equality Act (2010) for England, Scotland and Wales, and relevant government orders in Northern Ireland.

Protected characteristics

The Equality Act (2010) protects us all according to the following nine characteristics:

- Age
- Disability
- Pregnancy and maternity
- Religion or belief
- Marriage or civil partnership
- Sexual orientation
- Gender reassignment
- Race
- Sex

In addition, we do not discriminate against people on these grounds:

- Class
- Caring responsibilities
- Health and HIV status
- Parental status
- Political opinion
- Spent criminal convictions

See our Equal Opportunities and Inclusion Policy on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

3.1. Equality, diversity and inclusion in practice

We all share responsibility for following our Equal Opportunities and Inclusion Policy. This means that we all must:

- Value and respect one another
- Ensure nobody is harassed, bullied or victimised
- Report unfair or offensive treatment
- Seek to include all people affected by MS and not discriminate against anyone when providing services

You should challenge unfair or offensive treatment on any grounds, not just in relation to MS. Report concerns to your Local Networks Officer (LNO).

For contact details for your LNO, see Your Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

3.2. Volunteer involvement

The involvement of volunteers is vital to enable us to achieve the ambitions of our strategy. We make sure you have the resources and skills you need, and can clearly see the difference your volunteering has on the lives of people affected by MS.

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

All volunteer involvement is at our sole discretion and we reserve the right to remove an individual from their volunteering relationship with us, for whatever reason. For example, if a person fails to apply for a disclosure check, or to satisfactorily complete ‘must do’ training, they will not be allowed to volunteer with us.

See our Volunteer Involvement Policy on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

3.3. Involving people affected by MS

Although people with MS and those who care about them benefit from our work, they are also integral to designing and delivering it.

We expect your group to involve people affected by MS in decision making and encourage them to play an active role in planning services and activities. You must make sure all planning and consultation opportunities are accessible to people affected by MS.

See B6: Planning and delivering quality services and activities for guidance on what your group could offer.

3.4. Personal care

People with MS must be able to use our services and activities knowing that they will be treated with dignity and respect, and that they will have access to the personal care they need.

In most cases, personal care should be provided by a person's own carer, who may be a family member or a paid carer. However, if you organise a service or activity that aims to give primary carers a break, your group must supply contracted care assistants to provide personal care.

We don't expect our staff and volunteers to provide personal care and you must never do so.

Learn about your responsibilities under our Personal Care Policy on the volunteer website, or ask your LNO for help.

4. Dealing with problems

A complaint or concern can be raised by any volunteer, MS Society member, employee, person affected by MS, person connected with another organisation, or member of the public.

Our process for dealing with problems

- The most common issues experienced by groups are things that can be dealt with by your Coordinating Team. If a problem does arise, your first step should be to assess whether you are able to deal with it in this way.
- If your Coordinating Team is unable to deal with a problem informally, contact your LNO for help to work through it.
- If this isn't appropriate and your complaint or concern needs to be dealt with formally, you must follow the appropriate policy and procedure.

Find out more

See C3: Your Coordinating Team for guidance on how your group should operate.

4.1. Our policies for dealing with problems

The policies below explain how we deal with the different sorts of problems that may be raised with you. Speak to your LNO if you are unsure about which policy applies to your situation.

Comments, compliments and complaints

Our Comments, Compliments and Complaints Policy will help you deal with comments and complaints about functions or services in any part of the MS Society.

Dignity at work and when volunteering

We take bullying and harassment seriously, and we will not tolerate it. Our aim is to protect our volunteers and staff from such behaviours and to promote a culture of mutual respect.

Our Dignity at Work and When Volunteering Policy sets out the process for dealing with such behaviours informally and formally.

Resolving volunteer issues

You must follow our Resolving Volunteer Issues Policy if a volunteer has concerns about their volunteer experience. This policy also applies when you have concerns about a volunteer, or a volunteer has concerns about a staff member.

Safeguarding

Although encountering abuse is rare, it is important that it is never ignored. Our Safeguarding Policy sets out what you must do if you witness, suspect or are told that a person in contact with the MS Society has been abused.

Whistleblowing

Our Whistleblowing Policy sets out the procedure to follow if you have cause to raise a concern about exceptional or serious malpractice, such as health and safety, fraud or mismanagement.

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A4: Our legal identity, policies and rules

In this section

1. Our identity in the eyes of the law

We are registered with the name Multiple Sclerosis Society:

- With the Charity Commission in England and Wales – registered charity number 1139257
- With the Office of the Scottish Charity Regulator – register number SC041990
- As a company limited by guarantee in England and Wales – 07451571

The registration of charities in Northern Ireland has not yet been extended to us.

Your official documents must display this as follows:

> Multiple Sclerosis Society. Registered charity numbers 1139257/ SC041990. Registered as a limited company in England and Wales 07451571.

Being a 'charitable company' is in line with other charitable organisations and reduces some risks compared to being an unincorporated charity.

You must refer to us as the Multiple Sclerosis Society or more usually, the MS Society, or MS Society plus nation suffix (for example, MS Society Scotland).

We are registered as a data controller and processor under the terms of the General Data Protection Regulation (GDPR), and we have a Register of Processing Activities which documents the breadth of processing we do. We have one GDPR registration to cover the whole organisation, including all local processing activities.

Find out more See A6: Handling data for more on our data responsibilities.

2. Our charitable objects

Our 'charitable objects' (long term aims) are:

- To support and relieve people affected by MS
- To encourage people affected by MS to attain their full potential by improving their conditions of life
- To promote research into MS and allied conditions and publish the results

Under charity law, all of our activities must reflect these objects, which is why we can't provide services to people who aren't affected by MS. Our organisational goals capture what we are currently working towards.

Find out more See A1: Introduction and overview for our three long term organisational goals.

3. Representing us

We are one organisation with one brand, one company number and one charitable status through the regulators in Scotland, England and Wales.

3.1. Delegation of authority

The Board of Trustees delegates authority via the Chief Executive to our volunteer-led MS Society groups.

Find out more See Governance of MS Society Volunteer-Led Groups on our volunteer website, or ask the Supporter Care Team for help.

'Delegation of authority' gives your group the right to use the following assets:

- The name Multiple Sclerosis Society, more commonly known as the MS Society
- Our charity registration numbers and company limited by guarantee number

- Our official branding
- Our fundraising merchandise and printed materials

You must include our name, brand and charity numbers in all official correspondence and publications. You must not misuse these assets, nor permit their misuse by unauthorised groups or people.

Find out more

Download a Letterhead Template with our registration details and your national logo from the volunteer website, or ask the Supporter Care Team for help.

4. Following our policies and rules

Policies are official documents that support the way we work. Our policies are set by our Executive Group and/or by the Board of Trustees and form the basis of the systems and procedures we follow.

Find out more

See Appendix 2: Sources of support for staff and governance contact details.

As an MS Society group, you must follow all of our policies that apply to volunteers and to groups; the authority which is delegated to you is on the basis that you do. We provide clear rules, written guidance and staff support to enable you to do this.

Find out more

Download Policies and Documents on our volunteer website, or ask the Supporter Care Team to send you a printed copy of the policy you need.

You'll find links to the policies that support our group requirements throughout the Group Handbook.

4.1. Group rules

Where we use the word 'must' or 'we expect you to' in this handbook, it means a specific rule that you must comply with. Where we use the words 'we want you to' or 'we recommend', these indicate our suggested best approach.

We've summarised many of these must do's at the end of this handbook.

Find out more

See Appendix 3: MS Society rules for groups for a list of must do's, or ask your Local Networks Officer for help.

4.2. Financial rules

If your group handles money, you must follow our financial rules. These rules are to ensure your group meets the legal requirements that apply to us as a charity, and that we all maintain appropriate controls to safeguard the use of the MS Society's charitable assets.

See Appendix 4: MS Society financial rules for groups or ask our Finance Support Team for help.

4.3. Fundraising standards

The Fundraising Regulator sets and maintains the standards for charitable fundraising, and regulates fundraising, in England, Northern Ireland and Wales – and also in relation to many charities, including us, in Scotland.

The Fundraising Regulator holds the Code of Fundraising Practice for the UK. All of our fundraising activities must comply with this code, including how we deal with complaints about fundraising.

See Appendix 5: Code of Fundraising Practice in summary or ask your Area Fundraiser or National Fundraising Manager for help.

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A5: Health, safety and wellbeing

In this section

1. Staying safe when volunteering
2. Reporting accidents
3. Risk management
4. Safeguarding
5. Equipment purchases and donations
6. Insurance
7. Minibus administration

We all share responsibility for the health, safety and wellbeing of everyone who works with us, people using our services, and anyone else affected by what we do.

We have a health and safety system in place to meet the legal minimum standards to keep us all safe. The system also helps protect the MS Society financially – and you from personal liability.

Your Group Coordinator is responsible for implementing our Health and Safety Policy. However, all group volunteers have a duty of care to promote and support our risk management process.

Find out more

See our Health and Safety Policy on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

You may choose to recruit one or more Health and Safety Volunteers to ensure everyone in the group is aware of their health and safety duties.

Find out more

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

1. Staying safe when volunteering

Your safety is our priority and we never want you to take any unnecessary risks when volunteering for us. You must follow our Lone

Volunteering Policy whenever you undertake activities alone on our behalf.

This could include when you meet a person, enter a new environment, or travel alone, as part of your volunteering role.

1.1. Making home visits

We don’t expect our staff and volunteers to make home visits alone and you must not do so on our behalf.

If home visiting is the only possible way to visit or meet with someone, you must ensure that at least two people visit together.

Find out more

See Lone Volunteering on our volunteer website, or ask the Supporter Care Team for help.

2. Reporting accidents

You must complete an Accident Report Form after each accident where a person is injured, no matter how minor the injury. If there is an incident or a near miss where no one is injured, you should fill out an Incident Report Form.

Find out more

Download an Accident Report Form or Incident Report Form from the volunteer website, or ask our Health and Safety Team to send you a printed copy.

All completed accident and incident forms must be emailed or posted to the Health and Safety Team. We don’t expect your group to retain copies of accident and incident forms. You must dispose of paper forms by shredding or burning them.

Find out more

See A6: Handling data for your responsibilities when handling personal data.

3. Risk management

3.1. Fitness, property and transport

Your group must carry out regular risk assessments if you run fitness activities, have property or provide transport.

We define fitness activities as:

- Physiotherapy
- Complementary therapies
- Exercise provided by individual instructors and organisations
- Water based exercise
- MS Society owned exercise equipment used in organised sessions

Fitness, property and transport risk management and your role

If your role involves coordinating fitness, property or transport, you must understand and use our risk management systems.

Fitness

- Activities Organiser
- Activities Volunteer

Property

- Property Volunteer
- Shop Volunteer

Transport

- Transport Volunteer
- Passenger Assistant
- Volunteer Driver

3.2. Events

Some events and meetings your group organises require you to complete a risk assessment. Other lower risk events and meetings are covered by our simplified events risk guidance documents. We define events as:

- Cheering points, information points and stalls
- Group outings
- Store and street collections
- Formal and informal meetings
- Events including low level physical activity
- Events run by professionals
- Coach trips with a hired vehicle and driver
- External use of MS Society property

Events risk management and your role

If your role involves coordinating meetings, fundraising activities or MS Support events, you must understand and use our events risk management system.

Meetings and information events

- Administration Volunteer
- Information Events Volunteer

Fundraising

- Fundraising Volunteer
- Fundraising Events Volunteer

MS Support

- Lead Support Volunteer
- Support Volunteer

You must review all risk assessments and events risk guidance annually, but also if things change in between reviews (so your risk management is kept up to date).

See our Risk Management System on the volunteer website, or ask the Supporter Care Team for help.

Events risk management on the Portal

The 'services and activities' tab on the Portal is our record of all services, activities and events delivered by MS Society groups throughout the UK.

Whenever you add a new event, the Portal identifies whether it requires an events risk assessment, or is covered by our simplified events risk guidance. You will be asked to confirm that the appropriate level of risk management has been completed.

To request access to the Portal, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

3.3. Providing personal care

People with multiple sclerosis (MS) must be able to use our services and activities knowing that they will be treated with dignity and respect, and that they will have access to the personal care they need.

In most cases, personal care should be provided by a person's own carer, who may be a family member or a paid carer. However, if you organise a service or activity that aims to give primary carers a break, your group must supply contracted care assistants to provide personal care.

We don't expect our staff and volunteers to provide personal care and you must not do so on our behalf.

Find out more

Learn about your responsibilities under our Personal Care Policy on our volunteer website, or ask your Local Networks Officer (LNO) for help.

4. Safeguarding

Safeguarding means making sure that people at risk in contact with the MS Society are protected from abuse. Abuse can mean being physically or sexually harmed, being frightened or neglected. Although encountering abuse is rare, it is important that it is never ignored.

You may become aware of abuse if you:

- Witness a form of abuse
- Suspect someone is being abused
- Are told about abuse by a person with MS or someone they know

4.1. What to do if you become aware of abuse

We don't expect our volunteers to deal with safeguarding concerns and you must not do so on our behalf.

If you become aware of abuse, or suspected abuse, report your concerns to the Safeguarding Responders Group by email as soon as possible, or by calling your MS Society national office.

Find out more

See Appendix 2: Sources of support for national office contact details.

Safeguarding Responders Group
safeguarding@mssociety.org.uk
Tel: Via your national office

A member of the Safeguarding Responders Group will make enquiries into the issue, and depending on the circumstances, it may be referred on to social services and/or the police.

Our national offices and the Safeguarding Responders Group are available Monday to Friday, 9am to 5pm. If there is any immediate danger, you should stay safe and call the police.

See our Safeguarding Policy and guidance on the volunteer website, or contact the Safeguarding Responders Group for help.

Safeguarding risk guidance documents

Our safeguarding risk guidance documents identify potential safeguarding concerns that may arise when your group provides services and activities.

Use these guidance documents to help you plan and deliver services and activities that are safe for everyone who attends.

See our Safeguarding Risk Guidance on the volunteer website, or ask the Supporter Care Team for help.

4.2. Services for young people under 18

We do not actively provide or promote services to young people under the age of 18. However, we do not want to exclude young people (aged 16 or 17) from accessing services that would be beneficial to them.

If a young person enquires about using a service your group provides, or you are considering developing a service for young people, you must contact our Quality and Safeguarding Manager for advice. An individual assessment of each request must be made before you proceed.

See B6: Planning and delivering quality services and activities for guidance on setting up services.

5. Equipment purchases and donations

Your group must not purchase or accept donations of fitness, mobility or clinical equipment for the purpose of lending it to people with MS. We are not qualified or insured to assess the safety and suitability of a piece of equipment for each individual who may wish to borrow it.

This includes the following types of equipment:

- Any type of fitness equipment
- Wheelchairs
- Scooters
- Special equipment – beds, chairs and stair lifts
- Clinical aids – FES/TENS machines

5.1. Advertising unwanted equipment

Your group can advertise a piece of unwanted equipment to our members on a person's behalf. Interested parties must be advised to contact the donor directly and you must include our Disclaimer:

Disclaimer

Whenever your group signposts people to products, information or services provided by other organisations, such as in a newsletter or email, you must include our Disclaimer:

"Information contained in this publication is for information purposes only, and does not constitute advice or a recommendation. Where we provide information about external organisations or service providers, we are not able to offer any guarantee on the quality or safety of their services or products, or whether they are suitable for an individual's needs. We take no responsibility for any errors or omissions in this information."

Our Disclaimer is already included on the appropriate Web to Print templates.

To request your Web to Print account, log in or get support, see Using Web to Print on our volunteer website, or ask the Supporter Care Team for help.

5.2. Awarding an equipment grant

If your group is asked to purchase a piece of equipment for an individual for their sole use, they must submit a Health and Wellbeing Grant application, and provide the required letters of support from suitable healthcare professionals, to enable us to make a fair and transparent decision.

The MS Society is not responsible for maintenance or repair of equipment awarded as an MS Society grant.

Find out more

For more on our grants process, see National Grant Funds on the volunteer website, or ask the Supporter Care Team for help.

6. Insurance

6.1. Cover provided centrally

Services, activities and events organised or co-organised by MS Society groups are covered by our central insurance.

Our Summary of Insurance Cover details what services, activities and events are covered by our:

- Public Liability Insurance Certificate
- Employer's Liability Insurance Certificate

Find out more

Download our Insurance Documents from the volunteer website, or ask the Supporter Care Team to send you printed copies.

6.2. When you must arrange your own cover

Events

Any event not listed on our Summary of Insurance Cover.

Vehicles

No group cover exists within the MS Society; you must have a minimum of third party liability insurance.

If your group hires a vehicle and provides your own volunteer driver, you must ensure that the vehicle hire includes a minimum of third party liability insurance, as no cover exists within the MS Society for volunteer drivers.

Property

Buildings and contents insurance is needed for any property owned by the MS Society.

6.3. Arranging additional cover

You must ensure that your group is adequately covered by any further insurance which may be necessary.

Our insurer, Arthur J Gallagher can provide competitively priced quotations for additional cover in other areas.

If they are unable to help, or you require further advice on your insurance needs, contact the Facilities Team.

> Our central insurance does not cover providing advice, including attendance at appeals or tribunals.

7. Minibus administration

If your group runs a minibus, you must hold a Section 19 Permit and disc to show that you are exempt from certain statutory rules and regulations.

The permit and disc are free of charge and issued to an ‘operator’ (your Coordinating Team) rather than a vehicle, so the disc can be moved to another minibus if required.

See C3: Your Coordinating Team for how your group should operate.

Once you have a Section 19 permit, you can apply for the Bus Services Operator’s Grant and claim back 80 percent of your fuel tax.

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Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
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A6: Handling data

In this section

1. The General Data Protection Regulation

All MS Society volunteers and staff must follow the General Data Protection Regulation (GDPR). The GDPR gives people broader rights, and places greater obligations on organisations that control or process personal data than the Data Protection Act (1998), which it replaces. Our obligations apply to personal data held in any form, both electronic and on paper.

We are all responsible for protecting the privacy of individuals and their right to control the ways we use their personal information. We have a detailed Data Protection Policy and Privacy Notice in place to ensure we fulfil our legal data protection requirements, and protect you from personal liability, provided that you follow our guidance.

Data Governance Team

Our Data Governance Team is here to make sure we all meet our personal data, information handling and record keeping obligations. Contact the Data Governance Team for help with any data compliance questions you may have.

Data Governance Team
datagovernance@mssociety.org.uk
Tel: 0203 872 8735

1.1. Types of personal data

‘Data’ or ‘personal information’ means a piece or pieces of information which can identify a living person. We hold personal data about our members, supporters, volunteers, staff, and people who use our services.

Examples of personal data include someone’s name, address and date of birth, as well as ‘special category’ personal data which is more sensitive, such as physical and mental health (for example, whether a person has multiple sclerosis), ethnic origin, religious and political beliefs, sexual orientation and trade union membership.

1.2. Why data protection is important

We are a ‘data controller’ and ‘processor’, and we have a Register of Processing Activities which documents the breadth of processing we do. We have one registration to cover the whole organisation, including all local processing activities.

Organisations that are data controllers are legally required to ensure that personal data is:

- Fairly, transparently and lawfully processed
- Processed only for specified purposes
- Adequate, relevant and limited to what is necessary
- Accurate and kept up to date
- Not kept for longer than is necessary
- Kept secure (both technically and procedurally)
- Not transferred outside of the EU without adequate protection

What is data processing?

Data processing includes anything we do to or with personal information, such as filing, updating, copying, checking and sharing. Data processing also covers simply storing data, even if nothing is done with it.

1.3. Rights of the individual

People have the right to:

- Be provided with privacy information whenever data is collected, which tells them about that processing.
- See what personal information an organisation holds about them, for what purpose, on what lawful basis, where in came from, who it will be shared with, and how long it is expected to be held for.
- Have errors or inaccuracies in their personal information corrected.
- Have excessive or irrelevant personal information deleted.
- Be forgotten – that is, to have all data held about them deleted (in most cases).
- Object to processing.
- Not have solely automated decisions made about them based on their data.

1.4. Subject access requests and other data subject rights

A ‘subject access request’ is when an individual contacts an organisation to find out what personal information is held about them. You may also receive other types of data subject requests that relate to the additional rights listed above. All subject access requests must be directed to the Data Governance Team.

Your group must not attempt to deal with subject access requests or any other data subject request. You may be contacted by the Data Governance Team if they receive a subject access request or other data subject request.

If asked by the Data Governance Team, you must provide copies of the personal information held by your group about the individual who has made the request.

Privacy statements

Whenever you collect personal data from an individual, you must give them a summary of how their personal information will be processed, and for what purposes.

We do this by including our up to date 'privacy statement' and a link to our full Privacy Notice in all forms we use to collect personal data. This information must be in the same font size as the main body of text.

See Privacy Statements on our volunteer website, or ask the Supporter Care Team for help.

1.5. Your access to personal data

You may have access to personal data as part of your volunteer role. This could include any of the following:

Members

You may be in a volunteer role that is authorised to request membership data to communicate with our members:

- Group Coordinator
- Administration Volunteer
- Lead Support Volunteer
- Finance Volunteer
- Communications Volunteer
- Support Volunteer

Group Coordinator responsibilities

Your Group Coordinator is responsible for ensuring that all volunteers with access to personal data as part of their volunteer role understand their obligation to handle data in line with the GDPR.

Depending on your role, this may mean completing our Data Protection for GDPR eLearning (see 'Using membership data' below) or confirming that you have read and can apply the rules in this section of the Group Handbook.

Volunteers

Your role may include maintaining the records we keep about other volunteers in your group:

- Group Coordinator
- Lead Support Volunteer
- Activities Organiser
- Health and Safety Volunteer
- Fundraising Volunteer
- Transport Volunteer

Service users

You may be in a volunteer role that involves collecting personal data on an exercise class or property register, a minibus emergency contact list or grant application form:

- Activities Organiser
- Volunteer Driver
- Lead Support Volunteer
- Property Volunteer
- Activities Volunteer
- Passenger Assistant
- Support Volunteer
- Information Events Volunteer

Supporters

You may collect personal data about our supporters on sponsor forms or Gift Aid declaration forms, or deal with communications from supporters:

- Communications Volunteer
- Fundraising Events Volunteer
- Shop Volunteer
- Fundraising Volunteer
- Administration Volunteer

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

2. Your personal data responsibilities

We must all take responsibility for ensuring that all personal data we have access to is kept safe and secure, and only used for the purpose/s agreed by the individual. It is crucial that we handle it carefully according to the principles of the GDPR.

2.1. Data protection rules

- All personal data belongs to the person to whom it refers. They have a legal right to see what personal information is held about them.

- Anybody who stops volunteering with us must return all personal data owned by the MS Society to your Coordinating Team within seven days. This includes paper based personal data and personal data held on a computer, laptop, tablet, smartphone, or on an encrypted memory stick (see 'Keeping personal data safe and secure' below).

  Failure to return personal data within this timescale is data theft and may result in the matter being reported to the Information Commissioner's Office (ICO) and the Police.

- You must not publish a person's personal data anywhere unless you have their prior consent in writing for the publication you intend to make. If in doubt, contact our Data Governance Team for assistance.

- You must be discreet with personal information at all times, and maintain confidentiality where necessary.

Safeguarding, emergencies and data protection

You must report all abuse or suspected abuse to the Safeguarding Responders Group, even if you have not been able to obtain permission.

If someone’s life is in immediate danger, data protection laws do not prevent you from acting immediately to share information with the emergency services, health professionals or other authorities.

However, if your group is approached by the Police or any other authority asking for information about a person in anything other than a life or death situation, you must always refer them to our Data Governance Team.

Find out more See our Safeguarding Policy and guidance on the volunteer website, or contact the Safeguarding Responders Group for help.

2.2. Keeping personal data safe and secure

The GDPR applies to both paper and electronically stored personal data and you must ensure that both are kept safe and secure at all times.

When not in use, all personal data must be stored securely. Only volunteers in roles that are allowed to use personal data must be permitted access to it.

Paper based records

Paper based personal data must be kept in a locked drawer, filing cabinet or cupboard at all times when it is not being used. Access to the key or combination lock must be limited only to volunteers in roles that are allowed to use MS Society personal data. You must not allow members of your family to access personal data you hold.

Avoid taking paper copies of personal data from your home. Where this is unavoidable (such as for events or meetings), you must keep them in your possession at all times. You must not view them where members of the public may be able to see them, and you must never leave them unattended on a train seat or in a car.

Purchasing storage

Providing the necessary equipment for your volunteers to keep data securely is an appropriate use of group funds. If your group doesn't have a lockable drawer, filing cabinet or cupboard, your Coordinating Team should purchase one from a local stationer or website.

When a volunteer leaves, we expect them to return the personal data they hold and any items purchased by your group to store it.

See C3: Your Coordinating Team for guidance on how your group should operate.

Electronic records

Electronically stored personal data must be held in a password protected file on a computer, laptop, tablet, smartphone or on an encrypted memory stick. All devices used to store or access personal data must need a password to be accessed. Access to the device and password must be limited only to volunteers in roles that are allowed to use MS Society personal data.

For guidance on password protection, see IT Support on our volunteer website, or ask the Supporter Care Team for help.

Keeping information in the Cloud

With the exception of MS Society email accounts accessed via Office 365, you must not use cloud based storage (for example, Dropbox, Google Docs or Google Drive) to store personal information and data.

2.3. What is a data breach and what do I do if it happens?

A 'data breach' is any situation where personal data is made insecure. In some situations it will be obvious that personal information has been accessed in error, but this is not always the case.

A breach might be caused by:

- Clicking on unsafe links in emails that breach the security of your computer. This may then give access to your contact lists and may also allow corruption to or damage of data stored.

- Sending an email to a list of contacts using the 'To' field instead of the 'Bcc' field (thereby sharing everyone's email addresses with everyone else, which they may not have consented to, or be happy with). Further unauthorised sharing can happen if that email is then forwarded.

- Leaving personal information in a public place – either in printed form or on a public or shared PC or smartphone.

- Verbally sharing personal information with someone who should not have access to it.

- A mistake in how an IT system is set up.

- Someone else breaking into or 'hacking' an IT system.

- Theft or loss of hardware that contained personal information

This list may not include every possibility of a breach, so if you are unsure, you must speak to our Data Governance Team without delay.

Reporting a data breach

You must speak to our Data Governance Team to report any potential data breach immediately. We are required to inform the Information Commissioner's Office of a breach within 72 hours of any volunteer or member of staff becoming aware of it.

Data Governance Team
datagovernance@mssociety.org.uk
Tel: 0203 872 8735

Reporting a lost or stolen mobile device containing MS Society data

As soon as you become aware that your device is missing, contact IT Lab (our IT support service) to inform them. They will initiate a partial wipe to remove all MS Society data and reset your MS Society email password with you.

IT Lab
Tel: 0207 030 3999

3. The rules for sending, receiving, storing and sharing emails

Under the GDPR, there are specific rules for dealing with emails.

Find out more

To request your individual MS Society email account, log in or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

- You must use MS Society email whenever you handle personal data by email, act as an account signatory on your group's cash pooling account, or communicate with external organisations or people by email on our behalf.

- When emailing more than one person, you must not disclose their email address to others receiving the email. Always use 'blind carbon copy' (bcc) when you send emails so that recipients can't see each other's email addresses.

- When emailing members, you must use up to date membership data. A member can contact us at any time to change their email preferences. You must use the Portal to download membership data each time you need it, and delete this as soon as it has been used.

- You must store written and digital communications securely and never share them with third parties. You can only share an email with another MS Society volunteer if you need their help to reply to it.

- You must not use a person's email address to communicate with them unless they have agreed to receive emails from us. If a non-member or local supporter emails your group, this does not mean you can use their email address to contact them about other matters.

- You must offer people the option to opt out of receiving written and digital information from us. Your MS Society email automatic signature includes an unsubscribe option.

  When you receive an unsubscribe request from a member, you must update the Portal or inform our Supporter Care Team.

4. Using membership data

If your group handles money and delivers services and activities, you need to be able to communicate with MS Society members in the area who have agreed for their details to be shared with you.

4.1. Who can access membership data?

You can only access membership data if you are in a volunteer role that is authorised to do so. This is to ensure that we meet our data protection requirements.

Volunteer roles with access to membership data:

- Group Coordinator
- Administration Volunteer
- Lead Support Volunteer
- Finance Volunteer
- Communications Volunteer
- Support Volunteer

4.2. Data on the Portal

Your group must use the Portal to access membership data. This will ensure that we only use up to date information about members who have agreed to be contacted by us.

Each time you use the Portal to download membership data as an Excel spreadsheet or PDF, you will be asked to confirm the reason for the download. You must not use this downloaded data for any other purpose.

You will be prompted to protect the file with a password. You must not share this file password with anyone who is not in an authorised volunteer role.

Find out more

To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Data Protection for GDPR eLearning

Both our organisation and individuals are at risk of significant fines from the ICO if we can’t show them data protection training records for our staff and volunteers.

Data Protection for GDPR eLearning aims to build your confidence and helps you to avoid making a mistake inadvertently. You can check your learning and ensure your training record is entered by completing the multiple choice test at the end.

You must complete Data Protection for GDPR eLearning if any of the following apply to you:

- Your role involves handling personal information, such as a Group Coordinator or Finance Volunteer
- You have access to membership data
- You use MS Society email, our Portal or Online Recruitment
- Your role specific Welcome and Induction Checklist includes Data Protection for GDPR eLearning as 'must do' training

We will ask you to complete Data Protection for GDPR eLearning even if you have completed previous data protection training.

Contact our Data Governance Team if you have any questions about Data Protection for GDPR eLearning.

4.3. The importance of using current membership data

When sending out newsletters or email communications to members, you must not use membership data that:

- is more than 28 days old
- was requested for a different purpose

Emails and newsletters are classed as marketing and members have the right to change their 'marketing contact preferences' at any point.

If a member requests a change to their marketing contact preferences, you must let the Supporter Care Team know as soon as possible, to enable us to update our membership database within the required 28 day notification period.

If a person does not appear on a current membership list you download from the Portal, you must not contact them for any reason.

5. What about images and stories?

The GDPR applies to images and stories (often called 'case studies') too, although there are some circumstances where it is not necessary to obtain consent for images.

5.1. Images and stories used in advertising, publicity, newsletters and websites

In cases where a person’s image or story is intended to be, or may be used publicly, that person's consent must be obtained in writing and kept on file until one year after the last use of the image or story. You must specify to the person how their image or story may be used.

Download a Consent Form from our volunteer website, or ask the Supporter Care Team to send you a printed copy.

Web to Print and our data requirements

Web to Print is an online tool to support our groups to design and produce quality newsletters, stationery, and promotional items. It includes a bank of images with consent forms already on file. You can use these images with confidence that they meet our data requirements.

See B2: Using our brand for more on Web to Print.

5.2. When written consent is not needed

You do not need written consent when taking photographs of crowds or large groups at meetings or similar events. However, it is good practice to let those pictured know why photos are being taken, so that anyone who doesn’t want to be pictured can make themselves known.

If a person is seen close up, and can be easily identified, they must give written consent.

6. How long should we keep personal data?

The GDPR requires us to keep data for no longer than is necessary. You must follow these rules for different types of data:

Membership data

Membership data must be downloaded from the Portal and not held locally other than for the time it takes to complete a mailing or other task.

Find out more See C4: Membership administration for our membership data rules.

Volunteer application forms

We don’t expect your group to hold personal information about potential volunteers. If a candidate who submitted a paper application form is successful, either email or post it to our Supporter Care Team. If you don’t recruit them, you must destroy their application form.

Find out more See C1: Volunteering with us for guidance on recruiting volunteers.

Health and safety documents

You must post or email Accident Report Forms and Incident Report Forms to our Health and Safety Team and destroy all copies.

Health and safety documents such as Physical Activity Readiness Questionnaires (PARQ) must be reviewed annually and kept for three years after a person stops taking part in a service.

Find out more See A5: Health, safety and wellbeing for more on our risk management system.

Financial data

Our Online Accounting system enables you to safely store financial data relating to individuals. You must retain any other financial data for seven years to meet HMRC requirements.

Find out more See B4: Managing your finances for using Online Accounting to store financial data.

Grants

If your group awards grants, you must hold grants information for seven years following the issue of a successful grant application. Unsuccessful applications must be destroyed one year after the decision was made.

MS Support

We don’t expect Lead/Support Volunteers to hold personal information about people using your MS Support service, or make case notes about enquiries you have taken, and you must not do so.

Find out more See D1: Offering MS Support for more on handling sensitive personal information.

Events

You must retain personal information such as attendance lists and routine correspondence with individuals about events for one year following the event.

See B6: Planning and delivering quality services and activities for how to meet our local priorities.

Stories and photos

Stories and photos must be stored and used for no longer than three years. You must keep the Consent Form for the full duration of use plus another year after the deletion of the stories and photos themselves.

See B1: Availability, contact and communication for our guidance on using case studies and images.

6.1. Deleting information securely

Paper records must be shredded or burnt when no longer needed. Electronic records must be deleted from your PC or device’s storage, and the ‘recycling bin’ must be emptied.

When it’s time to replace IT equipment and phones, or you wish to pass them on to someone else, you should reformat disks to ensure that all content is deleted.

7. Sharing data with third parties

If your group provides services and activities, you may need to share personal information about the people who use them with a service provider. We have two processes to support you to keep data safe when sharing it.

You must contact your Local Networks Officer (LNO) before sharing personal information with a service provider not covered below.

For contact details for your LNO, see Your Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

Service Level Agreements

If your group receives complementary therapies, exercise, physiotherapy and talking therapies from a service provider, whether this is an individual or organisation, we expect you to set up a Service Level Agreement (SLA) which sets out the expectations of everyone involved.

For our SLA template and frequently asked questions, see Service Level Agreements on our volunteer website, or ask your LNO for help.

This SLA requires your service provider to look after data appropriately. You must involve your LNO if you plan to develop any service or activity that requires an SLA.

Data Protection Undertakings

If your group regularly hires transport or a venue, your service provider must complete a Third Party Data Protection Undertaking Form. This outlines our confidentiality and record-keeping requirements when handling personal information we share.

Download a Third Party Data Protection Undertaking Form from our volunteer website, or ask the Supporter Care Team to send you a printed copy.

Print two copies and ask your service provider to sign both. Give your service provider one copy for their reference and securely store the other copy until a year after you stop providing the service.

You don’t need to obtain a Data Protection Undertaking for one-off taxi, restaurant and hotel bookings.

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Sign off:	Head of Local Networks
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A7: Keeping in touch

In this section

Keeping us informed of your activities is a requirement for all MS Society groups. We expect you to do this in these ways:

- Have regular contact with your Local Networks Officer.

- If your group handles money and delivers services and activities, use the Portal to maintain a record of what you provide.

1. Your Local Networks Officer

Your Local Networks Officer (LNO) is your main contact, supporting your group to offer quality services and activities for people affected by MS. They will support you to use our volunteer resources and implement the processes that will strengthen and grow our MS communities throughout the UK.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

1.1. Contact standards

- Your group has a named LNO who is your point of contact for queries and support.

- Most LNOs work a standard day, but they also support evening and weekend meetings and events, so they will not always be able to speak to you. Their answerphone message will tell you when they will be available, and who to contact if your call is urgent.

- Your LNO is one of the key avenues for communication between your group and MS Society departments. To help you keep up to date with developments, they will ensure that you receive a monthly update on MS Society news and events.

- Your LNO will meet face to face with your Group Coordinator and/or Finance Volunteer once a quarter.

- At a minimum, your LNO will have monthly contact with your Coordinating Team. This could include email or phone contact, joining one of your team meetings, or supporting group fundraising or social events.

See C3: Your Coordinating Team for guidance on how your group should operate.

2. Maintaining a record of your services

If your group handles money and delivers services and activities, our Portal enables you to hold and access contact information for members, coordinate your volunteer team, complete risk assessments, and promote the services and activities you offer on our website.

The ‘services and activities’ tab on the Portal is our record of all services and activities delivered by MS Society groups throughout the UK. This includes social events, exercise and therapies, fundraising activities, and information about assets held, such as property and transport.

We will use this record to promote local services on our website and confirm that the appropriate level of risk management has been completed.

See B6: Planning and delivering quality services and activities for guidance on what your group could offer.

If your MS Society group handles money and delivers services and activities, all group volunteers can input information and maintain your services and activities record on the Portal.

2.1. Maintaining your services on the Portal

We want you to add as much information as you can about your services and activities to the Portal. We will ask you to review and edit this service information annually, but also if things change in between reviews (so your service information is kept up to date).

To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Data Protection for GDPR eLearning

Before you use the Portal for the first time, you must complete our Data Protection for GDPR eLearning. We'll send you a link to enrol when you set up your Portal account.

Both our organisation and individuals are at risk of significant fines from the Information Commissioner's Office if we can't show them data protection training records for our staff and volunteers.

Data Protection for GDPR eLearning aims to build your confidence and helps you to avoid making a mistake inadvertently. You can check your learning and ensure your training record is entered by completing the multiple choice test at the end.

We will ask you to complete Data Protection for GDPR eLearning even if you have completed previous data protection training.

See A6: Handling data for more on our data responsibilities.

3. Optional additional services

Although they are not requirements for MS Society groups, we know that certain services have a positive impact on people affected by MS. Your group may decide to provide one or more of these services to meet local need:

- MS Support
- Awarding grants
- Campaigning
- Fundraising (beyond the amount required to support your activities)

See A2: Requirements, support, tools and resources for an overview of our optional additional services.

3.1. Offering MS Support

Keeping us informed about your MS Support service is another way to help us understand our impact on the lives of people affected by MS.

If your group offers MS Support, we want your Lead Support Volunteer and Support Volunteers to use our MS Support monthly enquiry tally sheet to record and tell us about the number and types of enquiries you receive.

See D1: Offering MS Support for our MS Support priorities and how we help our groups to offer a local MS Support service.

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Part B: If your group handles money and provides services and activities

B1: Availability, contact and communication

In this section

If your group handles money and delivers services and activities, we expect you to meet our additional requirements.

The first is that your group must be available to all people affected by multiple sclerosis (MS) in the area, be easy to contact, regularly communicate with members, and ensure information about MS and MS Society services and activities is available to everyone in your community.

This section covers availability, being easy to contact, communicating with our members, and dealing with press and publicity.

See B2: Using our brand and B3: Giving information for support to meet the other aspects of this requirement.

Communication and your role

Your group may choose to recruit one or more volunteers to coordinate your group's communication and awareness raising activities:

- Administration Volunteer
- Communications Volunteer

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

1. Availability

Your MS Society group must be available to all people affected by MS in the area. This means:

- People affected by MS in the area know about your group.
- Your services and activities are accessible to all.

The online tools and written resources on our volunteer website will support you to meet this requirement.

1.1. Promoting your group

Promoting your group effectively means people know you are there for them. Groups with higher profiles also find it easier to recruit volunteers.

We recommend that you use our Web to Print templates to produce MS Society branded newsletters, posters, invitations and leaflets to publicise the services, activities and opportunities your group offers.

Make sure you always include contact details, locations, dates, and start and finish times.

Find out more

To request your Web to Print account, log in or get support, see Using Web to Print on our volunteer website, or ask the Supporter Care Team for help.

Services and activities on the Portal

The 'services and activities' tab on the Portal is our record of all services, activities and events delivered by MS Society groups throughout the UK.

Services and activities listed on the Portal are automatically published on our website. Maintaining this information on the Portal enables you to publicise your activities and keep us informed about what your group offers – a requirement for all our groups.

Whenever a person contacts the MS Helpline or our Supporter Care Team, the information we provide about local services, activities and events will be what is held on the Portal.

Find out more

To request your Portal account, log in or get support, see Using the Portal on our volunteer website or ask the Supporter Care Team for help.

1.2. Accessible to all

All venues used by your group to deliver services and activities must be physically accessible. Our risk management system includes an Access Audit Form to enable you to confirm this.

See A5: Health, safety and wellbeing for more on managing risk.

Accessibility can also mean that a service or activity is available by phone as well as face to face, or that transport is available, if required.

Your Local Networks Officer (LNO) will support you to set up services and activities that are accessible to all.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

2. Contact with your group

To meet this requirement, your group must do the following:

- Have agreed contact details with named volunteers responsible for monitoring each contact method.
- Have a named contact and contact details for each service and activity your group provides.

There are several contact methods available to your group – phone, post, email, our website, and social media.

2.1. Phone

People expect to be able to contact your group by phone. We recommend that you purchase a dedicated landline or mobile phone for making and receiving calls on our behalf.

For suggestions on setting up and maintaining a phone service, see Being Easy To Contact By Phone on our volunteer website, or ask the Supporter Care Team for help.

2.2. Post

Your group needs a local address listing that individuals and organisations can use to correspond with you. We recommend that you set up a PO Box address for this purpose.

Your PO Box can be set up to forward post to a home address, or you can agree on a named volunteer in an appropriate role to collect it.

Keeping your personal information safe

We strongly recommend that you do not share your personal information – including home addresses, email addresses and phone numbers – anywhere in print, online, or in email communications.

We want you to follow our guidance on setting up PO Boxes and dedicated phone numbers, and using MS Society email.

This ensures your safety and security, both during and after your time volunteering with us. It also makes it easy to transfer responsibility for a contact method if someone is away, or steps down.

2.3. Email

Being easy to contact by email has become an important way to support people affected by MS. It enables people who use screen reader software to access information in a way that suits them.

All volunteers who communicate by email on our behalf must use MS Society email to do so. Your group has a shared MS Society email address, and we are rolling out individual email addresses for volunteers who perform certain tasks or hold specific roles.

Using MS Society email means your email communication looks professional and meets our brand guidelines. It also ensures that information contained within emails is stored securely, as required by the General Data Protection Regulation (GDPR).

Find out more

To request your individual MS Society email account, log in or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

MS Support

If your group offers MS Support, you have access to a separate 'support@mssociety.org.uk' email address.

Emails to this address must only be dealt with by a volunteer who has completed Support Volunteer Training.

- Lead Support Volunteer
- Support Volunteer

See D1: Offering MS Support for our MS Support priorities and how we help our groups to offer a local MS Support service.

2.4. MS Society website

The MS Society website is a key way for you to promote your services and activities to people who may not already know what's available locally.

To update our website, you need to update the Portal – the information you add to the Portal about your services and activities is automatically published on the website.

Any changes you make on the Portal are updated overnight.

Updating your group contact details

Our Digital and Content Team maintains your group contact information on the website. Don't forget to get in touch if you need to change your contact details or make other amendments to your group web page.

Digital and Content Team
webteam@mssociety.org.uk
Tel: 0300 500 8084

2.5. Social media

Social media enables people to interact with each other by both sharing and consuming information over the internet.

Our volunteers and groups use social media to share news stories, images and information about MS and the MS Society. Your Coordinating Team may decide to set up a group account or you may do this via your own personal social media account.

Representing us on social media

Your personal social media account represents us if you identify yourself as an MS Society volunteer anywhere in your biography, posts or comments on others' posts.

Your group account must include your group name and our official social media profile image, and all posts and comments on others' posts must follow our social media rules.

Social media and your role

If you are responsible for maintaining your group social media account, your Group Coordinator must ensure you are listed as a Communications Volunteer on our volunteer database. This is so we know who to contact about your account.

Whenever your group recruits a new volunteer, or an existing volunteer changes role, your Group Coordinator must contact the Supporter Care Team to update our database.

For more on how the Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

Our social media rules

Whenever you use a group or personal account to represent us on social media, you must follow these rules:

- If you set up a group account, your description, biography or 'about us' section must state that the account is run by a group of MS Society volunteers and that 'Views are our own'.
- When using your personal account, you must add the statement 'Views are my own' at the end of your biography.
- You must not:
    - Post uncorroborated facts, stories or views of the MS Society.
    - Share messages that could be considered as defamation towards the MS Society, any member of staff or volunteer.

    - Post content, messages or links that could be considered inappropriate or illegal, including content that might offend someone on the basis of race, religion, age, sex, politics, nationality, disability, sexual orientation, gender or any other characteristic protected by law.

    - Engage in or encourage any illegal or criminal activities.

    - Post, share or forward spam, junk or phishing scams.

- All content you post must meet our data protection requirements. You must obtain written consent before posting any form of personal information, including images.

- Comments, messages and mentions will need to be monitored and moderated each day. Respond to each interaction (especially negative comments) with sensitivity and care. Escalate any remarks that are threatening, aggressive or rude to our Digital and Content Team.

Find out more

Download a social media profile image and read our social media guidance at Using Social Media on the volunteer website, or ask the Digital and Content Team for help.

Keeping your data safe online

We strongly recommend that you do not share your personal information – including home addresses and phone numbers – anywhere online. This includes on MS Society website pages, group and personal social media accounts, and PDF versions of your newsletters.

Your personal online security is your responsibility.

3. Communicating with our members

As a group that handles money and delivers services and activities, you have access to personal data about MS Society members within the area who have agreed for their details to be shared with you. You can use membership data to write to them, give them news about your group, and invite them to events and activities, by post and email.

3.1. What should we tell people about?

- How to contact your group by post, phone, email and online
- The services, activities and events you offer

- How you fundraise
- Your volunteering opportunities
- News about MS and the MS Society
- Information about local MS and community services

See A2: Requirements, support, tools and resources for the help available to you.

Disclaimer

Whenever your group signposts people to products, information or services provided by other organisations, such as in a newsletter or email, you must include our Disclaimer:

"Information contained in this publication is for information purposes only, and does not constitute advice or a recommendation. Where we provide information about external organisations or service providers, we are not able to offer any guarantee on the quality or safety of their services or products, or whether they are suitable for an individual's needs. We take no responsibility for any errors or omissions in this information."

Our Disclaimer is already included on the appropriate Web to Print templates.

3.2. Advertising and sponsorship

Selling advertising space in a communication is not normally acceptable, but acknowledging a donation is fine, provided you do not show the company logo.

Ask your Finance Volunteer for guidance, or contact our Finance Support Team for help.

3.3. Accessing membership data

The Portal allows volunteers in certain roles to access membership data and download it as an Excel spreadsheet or PDF to print out labels. And because it is updated overnight, Portal membership data will always be current.

Each time you use the Portal to download membership data as an Excel spreadsheet or PDF, you will be asked to confirm the reason for the download. You must not use this downloaded data for any other purpose.

You will be prompted to protect the file with a password. You must not share this file password with anyone who is not in an authorised volunteer role.

See A6: Handling data for your responsibilities when handling personal data, emails, images and stories.

4. Press and publicity

Publicising your activities via local newspapers and radio can help promote understanding of MS, raise the profile of your group, and attract new volunteers.

Press Office

Our Press Office is here to ensure we all generate great quality press coverage. You should keep them informed of your publicity activities.

Press Office
pressoffice@mssociety.org.uk
Tel: 0300 500 8084

4.1. Writing press releases

Press releases can be used to tell local media about your group activities. Often a friendly phone call is enough, but a press release can be useful if your chosen media outlet requests one, or you want to contact a lot of different people in a short space of time.

We recommend that you use one of our Press Release Templates to ensure all essential details are included before it gets sent out.

Download a Press Release Template and read our Press and Publicity Advice on the volunteer website, or ask the Press Office for help.

4.2. When the press contacts you

A journalist may contact you directly if they want to illustrate how national policy or healthcare decisions will impact people locally, or they may require more information on a local event or group activities.

If the call is important or sensitive, or it concerns national, political or research issues, you must contact the Press Office before responding. Only answer enquiries if you are sure of all the facts and be careful not to respond in a personal capacity – remember that you are representing us with your answer.

Political neutrality

As a national charity, we must not be seen to endorse one political viewpoint, or one political party, over another.

Listen to our podcast on political neutrality at Representing the MS Society on the volunteer website, or ask the Press Office for help.

Dealing with negative news

Negative news about MS Society groups is rare, but if you are concerned about a potential negative story, you must not ignore or avoid dealing with it – tell the Press Office straight away so we can help you prepare a response for if/when the media contacts you.

4.3. Choosing a case study

Illustrating an issue through a personal account from someone with MS (a 'case study') is a popular request from journalists. If you are asked to provide a case study, you must follow these guidelines:

- Make sure the person you ask understands where their story will appear and how many people will see or hear it.
- Only choose someone who is confident at talking about their MS and is happy to give out their name, age and be photographed.
- If you think you might want to use their information again, you must obtain permission in writing using our Consent Form.

Download a Consent Form on our volunteer website, or ask the Supporter Care Team to send you a printed copy.

Handbook B1: Availability, contact and communication v3.3	
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Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
Review date:	October 2020

B2: Using our brand

In this section

1. The MS Society brand

1.1. Why is a brand important?

A brand is a set of ideas, images and associations that tell people what an organisation is and what it stands for. It determines our personality as an organisation. Our brand is understood not only as our visual brand, but also by how people perceive us every time they come into contact with us.

How we look helps people build recognition of our brand. Everything from leaflets and posters, to newsletters and certificates, should be consistent and distinctive in order to show us as the forward thinking, inclusive and personable organisation we are.

Organisational values are characteristics that a brand aims to convey. We reflect our values in everything we do.

Find out more

See A3: Our values and how we deal with problems for how we define our organisational values and put them into practice.

1.2. Our visual brand

Our bold, orange, triangular logo communicates future confidence and momentum. MS Orange is warm and energetic; it helps people feel more positive about the future. We use these visual elements across our whole organisation.

For our full range of brand resources, see Using Our Brand on the volunteer website, or ask our Brand Centre for help.

Brand Centre

Our Brand Centre is here to support you to use our visual and written brand, and to create professional looking branded items.

Brand Centre
brand@mssociety.org.uk
Tel: 0300 500 8084

2. Using our brand in print, online, and in email communication

Your MS Society group is often the valuable first point of contact for people affected by MS, so using our name and brand appropriately is crucial to making a good first impression.

It is important that all group volunteers understand how to use our name and brand appropriately.

2.1. Brand basics

The Board of Trustees delegates authority to our volunteer-led groups, giving you the right to use our brand assets. You must not misuse our brand, or permit misuse by unauthorised groups or people.

See A4: Our legal identity, policies and rules for more on representing us.

You must follow these rules to meet legal best practice:

- Our logo and registered charity and company numbers must appear on all materials we produce, from letters and leaflets to email newsletters.
- Our logo must not be redrawn, digitally manipulated or altered.
- Our logo must have a good contrast with the background and preferably be in the top left corner.
- Our logo must only be used in relation to MS Society activities.

We have a range of logos to suit different purposes, including national logos, social media profile images and a fundraising 'in aid of' logo. You must ensure you use the correct version.

Download a version of the MS Society Logo on our volunteer website, or ask the Brand Centre for help.

2.2. Our written brand

It is important that the way we describe MS and the way we write about ourselves is consistent across all our materials and publications. Using our ‘key messages’ about MS and the MS Society enables us to do this.

We've created short, medium and longer key messages to ensure there is a version to suit your group's needs.

See your choice of key messages in our Brand Guidelines on the volunteer website, or ask the Brand Centre for help.

Our agreed local terminology

When we talk generally about our volunteer-led groups, we use the term ‘MS Society groups’ or ‘our groups’. When we refer to a specific group, we say ‘MS Society + group name’. For example, ‘MS Society Anytown’.

We want you to use our agreed terminology when you talk about your own, and other MS Society groups.

2.3. Text accessibility

As a leading disability organisation, we want all of our publications to be legible for people with visual impairment.

We all follow these guidelines to make sure that materials we produce meet our accessibility standards:

- Use at least 12 point Verdana or Arial font (and at least 16 point for large print).
- Left align text in Microsoft Word – this makes it easier for the reader to find the start and finish of each line.

2.4. Using our brand online

If your group uses social media to represent us, you must use our official social media profile image.

Find out more

Download one of our official social media profile image at Using Social Media on the volunteer website, or ask our Digital and Content Team for help.

2.5. MS Society email

All volunteers who communicate by email on our behalf must use MS Society email to do so. Your group has a shared MS Society email address, and we are rolling out individual email addresses for volunteers who perform certain tasks or hold specific roles.

Every MS Society email you send includes an automatic signature that includes your group name, contact details and a branded MS Society banner that changes to reflect our current priorities. This reinforces that we are all part of one organisation with shared values and goals.

Find out more

To request your individual MS Society email account or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

3. Web to Print

Web to Print is an online tool that supports our groups to design and produce quality newsletters, stationery and promotional items.

Web to Print includes a range of branded templates with space for group specific information, photos and content to be added. You can use it to design an item and download it as a PDF, or submit it to be printed and have the copies sent to you.

Web to Print charges

Your group must pay for items you submit to be printed and posted. Your Coordinating Team can decide how much you need to spend and printing charges will be taken directly from your group bank account twice a year.

When you use Web to Print, your item will already include our logo, colours and other brand features, so you can feel confident that whatever you produce will be clearly recognisable as coming from us.

To request your Web to Print account, log in or get support, see Using Web to Print on the volunteer website, or ask the Supporter Care Team for help.

4. MS Society branded materials

We have a range of branded materials available to support your group to fundraise, campaign and raise awareness of MS and the MS Society, including:

- Information resources
- MS Society merchandise

4.1. Our Online Shop

You can order branded materials from our Online Shop. Information resources and merchandise items are free of charge to your group, but please keep in mind our production costs and regular update schedule when placing orders.

To log in to your Online Shop account or get support, see Using our Online Shop on the volunteer website, or ask our Supporter Care Team for help.

Group Handbook B2: Using our brand v3.3	
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Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
Review date:	October 2020

B3: Giving information

In this section

1. Dealing with information enquiries
2. Promoting our publications
3. Our MS Helpline
4. Giving information about grants
5. Signposting to key local services
6. Using our disclaimer

We want everyone affected by multiple sclerosis (MS) to have access to the latest evidence based information and specialist support.

If your group handles money and provides services and activities, one of your requirements is to ensure that information about MS and MS Society services and activities is available to everyone in your community.

To meet this requirement, we expect your group to:

- Have named volunteers to deal with information enquiries
- Promote our publications
- Share our MS Helpline contact details
- Give information about MS Society grants
- Signpost to key local services
- Use our Disclaimer

Information giving and your role

Your group may decide to recruit one or more volunteers to coordinate and support your information giving activities:

- Administration Volunteer
- Activities Organiser
- Communications Volunteer
- Information Events Volunteer

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

Offering MS Support

We know that having access to MS Support delivered locally has a positive impact on people affected by MS, and we encourage our groups to provide this service.

If your group decides to offer MS Support, your information giving will be enhanced by Lead Support Volunteers and Support Volunteers who are experts at helping people affected by MS to make informed choices that meet their needs, in ways that suit them.

See D1: Offering MS Support for how providing a local MS Support service will enhance your information giving.

1. Dealing with information enquiries

You may receive requests for information about MS by phone or email, via social media, or in person.

To meet our information giving requirement, your group must have agreed contact details with a named volunteer responsible for monitoring each contact method.

We expect the volunteer responsible for each contact method to read this handbook section and use our information resources when dealing with enquiries.

See B1: Availability, contact and communication for support to use our contact methods.

Organising an information event

Organising an event is a great way to bring people together to give information to your MS community.

For everything you need to plan, deliver and follow up your event, see Organising an event on our volunteer website.

2. Promoting our publications

We have a wide range of award winning information resources – publications and factsheets that support people affected by MS to live life to the fullest, and engage in shared decision making about their health and wellbeing.

We want you to promote our publications at group meetings and events, in newsletters and on social media.

2.1. Ordering publications

You can order our information resources from the Online Shop. They are free of charge to your group, but please keep in mind our production costs and regular update schedule when placing orders.

To log in to your Online Shop account or get support, see Using our Online Shop on the volunteer website, or ask the Supporter Care Team for help.

You can also ask the Supporter Care Team to post individual copies of publications to people on your group's behalf.

The Information Standard

We are a certified member of the Information Standard. This is a quality assurance standard established to improve the quality of health and social care information.

Our Information Standard certification shows that we value our reputation and credibility. When you share MS Society publications, you can be sure you are providing quality information.

3. MS Helpline

Our MS Helpline offers emotional support, information and benefits advice to anyone affected by MS in the UK. We want your group to share the MS Helpline contact details with anyone you think could benefit.

The MS Helpline team is also here to support our volunteers and staff to deal with enquiries from people affected by MS.

The MS Helpline is free to call from landlines and mobiles within the UK. We also have a confidential email service.

- Freephone helpline: 0808 800 8000
- Helpline email service: helpline@mssociety.org.uk

4. Giving information about grants

We provide financial grants to people affected by MS for things they feel will make a positive impact on their life. We're here for all people affected by MS, so our grant programme is equally available to people with MS and their carers; and to both members and non-members. Our national grants programme is administered by the Grants Team.

Grants Team
grants@mssociety.org.uk
Tel: 0300 500 8084

If your group handles money and delivers services and activities, you must ensure that information about our national grants programme is available to all people affected by MS within your community.

4.1. Grants eligibility criteria

Our national grants programme considers applications from anyone who meets our eligibility criteria:

- They must have MS or be a carer for someone with MS
- They must live in the UK
- They must have less than £16,000 in accessible savings (if they have over £8000 they will be expected to make a contribution)
- There is no statutory or other funding available to help them meet their need
- They have not received a grant from us in the last 12 months

Find out more

Download a grant application form at National Grant Funds on our volunteer website, or ask the Supporter Care Team for help.

4.2. Health and Wellbeing Grants

Our Health and Wellbeing Grant Fund supports people with MS. It can help pay for mobility aids and home adaptations (where statutory funding is unavailable), holidays and respite, complementary therapies, and other things an applicant feels will make a positive and lasting impact on their life.

4.3. Carers Grants

Our Carers Grant Fund supports carers of all ages. We are flexible in what we can help with, within two categories – personal development and leisure. We encourage carers to apply for the things they think will benefit them.

Awarding grants locally

Although not a requirement for MS Society groups, we know that having access to a locally administered grants programme can have a positive impact on people affected by MS.

Where you have the capacity to deliver a local grants programme, we will offer support and guidance to help your group to do so.

See A2: Requirements, support, tools and resources for more on our optional additional services.

5. Signposting to key local services

5.1. Information and advice

We offer 'information' to support and enable people to take control and make choices for themselves. This means that it is up to the person to decide what works best for them, based on the information available, or knowing where to go to find out more.

'Giving advice' involves a person or organisation regarded as knowledgeable or authoritative making recommendations concerning future action.

We don't expect your group to give advice and you must not do so on our behalf. If a person needs specialist help, we want you to signpost them to a suitable service provider, or contact our MS Helpline for support.

5.2. Local contacts template

We expect all groups that handle money and deliver services and activities to maintain a list of local MS services to signpost to when dealing with information enquiries. We have developed a Local contacts template to help you do this.

Download our Local Contacts Template on the volunteer website, or ask your Local Networks Officer (LNO) for help.

It includes space to record contact details of key services, such as your local MS nurse (if there is one), Adult Social Care Team, and Citizens Advice Bureau.

We want your group to update this list regularly and share it with all volunteers who deal with information enquiries.

Signposting and MS Support

If your group offers MS Support, your Lead/Support Volunteers are trained to use our signposting criteria to identify suitable specialist advice providers.

Lead/Support Volunteers also have access to the list of UK-wide and nation-specific organisations that our MS Helpline signposts to.

See Signposting To Specialist Advice on our volunteer website, or ask your LNO about offering MS Support.

6. Using our Disclaimer

Whenever your group signposts people to products, information or services provided by other organisations, such as in a newsletter or email, you must include our Disclaimer:

> "Information contained in this publication is for information purposes only, and does not constitute advice or a recommendation. Where we provide information about external organisations or service providers, we are not able to offer any guarantee on the quality or safety of their services or products, or whether they are suitable for an individual's needs. We take no responsibility for any errors or omissions in this information."

Our Disclaimer is already included on the appropriate Web to Print templates.

To set up your Web to Print account, log in or get support, see Using Web to Print on the volunteer website, or ask the Supporter Care Team for help.

Group Handbook B3: Giving information v3.3	
Content Owner:	Assistant Director of Information and Support
Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
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B4: Managing your finances

In this section

If your group provides services and activities for people affected by multiple sclerosis (MS), one of our requirements is that you manage your finances.

Your Coordinating Team shares responsibility for the charitable funds held by your group. Here we set out how we expect those funds to be managed, kept and recorded. This section only applies to groups with access to an MS Society bank account.

Find out more

See A2: Requirements, support, tools and resources for an overview of our group requirements and how we support you to meet them.

Finance Team

We're here to support your group to raise, spend, hold and account for funds and assets under your control, in line with our policies and rules, and legislation.

The Finance Support Team is your contact for most day to day matters, but this section will tell you when you should contact a different member of our team for specialist help.

Find out more For details of who to contact about specific financial matters, see Finance Team on our volunteer website, or ask the Supporter Care Team for help.

1. Your financial responsibilities

1.1. Your Coordinating Team

Your Coordinating Team is responsible for ensuring MS Society funds and assets under your group's control are administered effectively and used exclusively in pursuit of our charitable objects.

Find out more See A4: Our legal identity, policies and rules for details of our charitable objects.

Your Coordinating Team must have a minimum of three volunteers, including a Group Coordinator, a Finance Volunteer and at least one other volunteer.

Finances on the volunteer website

Whether you’re a Finance Volunteer looking for day to day support, or a Coordinating Team reviewing what your group provides, you’ll find all the finance tools and resources you need on our volunteer website.

Find out more See Managing Your Finances on our volunteer website, or ask the Finance Support Team for help.

1.2. Finance Volunteer responsibilities

Although the Coordinating Team shares a collective responsibility for group finances, your Finance Volunteer leads on financial administration and reporting. This includes:

Reviewing group accounts (page 83)

Preparing and presenting financial reports to your Coordinating Team, advising on effective financial management and financial implications of decisions.

Planning and budgeting (page 84)

Leading your annual planning and budgeting meeting, and supporting your Coordinating Team to regularly review progress against your plan.

Keeping accounting records (page 85)

Using Online Accounting to analyse your group's financial transactions promptly, and ensuring accounting records are held for seven years.

Control of group funds (page 86)

Ensuring your Coordinating Team has adequate financial controls in place, including following the MS Society Financial Rules.

Supporting our internal audit requirements and safeguarding against fraud and financial mismanagement.

Raising funds (page 87)

Ensuring restricted funds and legacy income are handled appropriately, and that group trading activities are agreed and reported.

Use of funds (page 91)

Advising your Coordinating Team on proper use of funds to meet our strategic objectives, group requirements and local priorities. Leading the regular review of assets held by your group.

Banking and handling income (page 93)

Being a bank account signatory and acting as the main contact for banking matters.

VAT (page 96)

Being aware of VAT exemptions available to charities and to people with disabilities, and completing VAT exemption certificates where necessary.

Gift Aid (page 99)

Ensuring Gift Aid claims are made on eligible donations.

Finance Support Team

When you join us as a Finance Volunteer, you'll receive a phone call from our Finance Support Team to introduce you to the ways we can help you.

The Finance Support Team also sets up your Online Accounting log in (see below) and is available to all group volunteers to answer questions about group finances.

Finance Support Team
financesupport@mssociety.org.uk
Tel: 0131 335 4078

Find out more

For your role description and Welcome and Induction Checklist, see Finance Volunteer on our volunteer website or ask the Finance Support Team for help.

1.3. Reviewing group accounts

Ideally monthly and at least once a quarter, your Coordinating Team must meet to make decisions on behalf of the group and review group finances.

At each meeting, your Finance Volunteer should present a Receipts and Payments Report from Online Accounting along with any additional information your Coordinating Team will need to understand group finances. This should include details of money raised and costs incurred at each fundraising event. It should also cover any major differences between your group's actual income and expenditure, and those in your plans and budgets.

Here are some questions your Coordinating Team should consider when reviewing group accounts:

- Are we using the funds we hold to meet the needs of everyone affected by MS in the area?
- If donors could see the receipts and payments account, would they feel that the money they had given was being used effectively and wisely?
- Are we raising enough money to sustain the services and activities that we provide at the moment?
- Are we building up excess funds that should be used to meet the needs of people affected by MS?

- Could we contribute to UK-wide services such as our research programme, the MS Helpline or our national grant funds?

See C3: Your Coordinating Team for guidance on how your group should operate.

When you recruit a new Finance Volunteer

- Update bank account signatories and correspondence address
- Update HMRC Gift Aid registration
- Inform our Supporter Care Team and Finance Support Team
- Change your Online Accounting log in

1.4. Planning and budgeting

Each year, we expect your Coordinating Team to put together a plan of what your group will do, and a budget detailing how it will be paid for. We recommend that you hold an annual planning meeting and review your progress against budget at each team meeting throughout the year.

Planning and budgeting supports your Coordinating Team to:

- Identify your priorities and make sure they match our shared goals and what is needed locally.
- Work out what services and activities your group will deliver over the coming year.
- Consider who needs to be involved and the steps you need to take to start, improve or stop providing each service and activity.
- Identify potential problems with your finances, such as a shortfall in income or excess funds.

Your Local Networks Officer (LNO) is available to support you to plan and budget for the services and activities your group delivers.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

2. Keeping accounting records

2.1. Online Accounting

If your MS Society group handles money, you must use our Online Accounting system to record financial transactions.

Your bank statement is uploaded to Online Accounting on at least a weekly basis and your Finance Volunteer is responsible for allocating each line to the appropriate receipt or payment category.

To ensure your Coordinating Team has access to current information, we expect your new transactions to be allocated at least once a month.

Rules 4-7 of Appendix 4: MS Society financial rules for groups cover our accounting records and systems.

2.2. Reporting

All members of your Coordinating Team can have access to Online Accounting and can use it to produce a range of reports that can be exported in PDF or Excel format for review during or between team meetings.

To set up Online Accounting, log in or access the user guide and video tutorial, see Using Online Accounting on our volunteer website, or ask the Finance Support Team for help.

Online Accounting security

Don’t forget to change your Online Accounting password every six months.

2.3. Storing financial records

You must retain and securely store your group’s financial records (invoices, paying-in slips, etc.) for seven years to meet HMRC requirements.

3. Control of group funds

Good financial controls are important to ensure:

- Funds are used solely for the benefit of people affected by MS
- Volunteers are protected against allegations of fraud and misuse of funds
- All funds belonging to your group are received by the group
- Funds are properly safeguarded and never used in a way that would bring the MS Society into disrepute

3.1. Internal financial controls

To ensure good financial controls are in place in all our groups, we expect your Coordinating Team to follow Appendix 4: MS Society financial rules for groups. Each year, your Group Coordinator and Finance Volunteer must review and sign off this list and submit it to our Finance Team by 31 January.

Confirming your group's compliance with our financial rules enables us to meet the Charity Commission requirement to demonstrate that we have good financial controls in place throughout the MS Society.

If you answer 'don't comply' to any item on the list, you must include the reason/s why when you submit it.

See Appendix 4: MS Society financial rules for groups or ask our Finance Support Team for help.

3.2. Oversight of your group

Internal Audit

The purpose of Internal Audit is to assure our Board of Trustees that we have adequate internal controls in place throughout the MS Society.

You may be contacted by Internal Audit and asked to provide information to support this function.

Agreed upon Procedures report

At the end of each financial year, we ask a small number of groups to complete an Agreed upon Procedures (AUP) report, to be completed by an independent qualified accountant.

Your Coordinating Team is responsible for sourcing these services, and ensuring the AUP report is submitted to our Finance Team by 28

February. Paying a local accountant to complete your AUP report is a legitimate use of group funds.

Finance Team visits

The Finance Team also visits a number of groups each year to assure the Board of Trustees that our groups are keeping sufficient accounting records, have robust financial controls in place, and are making good use of charitable funds.

For more on how our Board of Trustees delegates authority, see Governance of MS Society Volunteer-Led Groups on our volunteer website, or ask the Supporter Care Team for help.

3.3. Fraud and financial mismanagement

We all share responsibility for recognising, reporting and protecting against fraud and financial mismanagement. Following the financial guidance in this section will help prevent fraud and financial mismanagement within your group.

Reporting concerns

If you are concerned about fraud or financial mismanagement, contact a member of our Finance Team or an MS Society Director immediately for support.

For more information, download our Whistleblowing Policy from the volunteer website or request a copy of our Anti-Fraud Policy.

See A3: Our values and how we deal with problems for more on reporting concerns.

Email correspondence

Do not reply to any email correspondence from a bank (including Barclays). Forward these to our Treasury Officer.

4. Raising funds

Your Finance Volunteer is responsible for ensuring that all funds raised using our name and/or logo are banked in a cash pooling account and recorded in Online Accounting.

Effective fundraising

If your group delivers services and activities, one of your requirements is to raise enough funds to cover the cost of your services and activities, as a minimum.

We've put together a range of resources to support groups to fundraise. See Effective Fundraising on our volunteer website or ask your LNO for support.

Find out more

See B5: Fundraising for our fundraising standards and how we keep fundraising safe.

4.1. Restricted funds

Most donations a group receives will be 'unrestricted', meaning they can be used to fund any service or activity that supports our charitable objectives.

Occasionally, funds are 'restricted'. This means that:

- The donor has specified that their donation is used in a particular way
- We have told the donor that their donation will be used in a particular way (for example, to buy a minibus)

Restricted funds must only be used for the purpose specified, and we expect you to follow these guidelines:

Fundraising

As a general rule you should try to ensure funds are not restricted. If you do tell supporters that your group is fundraising for a specific project, then the funds you raise are restricted to that project.

You need to make it clear to your supporters what will happen to their donations if the project doesn't go ahead, or if you raise more funds than the project requires. You must ensure your promotional materials state that if funds cannot be used for the project they will be spent on providing other group activities.

Funds can only be restricted at the time they are donated; your Coordinating Team may agree to allocate funds to specific projects for the purposes of planning and budgeting, but this is not an accounting restriction.

Research and other national projects

If you receive funds that are restricted to research or another national project, you must forward them to the Finance Team for administration.

Restrictions we can't accept

We can't accept funds that are restricted to a service or activity that doesn't support our charitable objectives. For example, we can't accept funds that are only to be spent on MS Society members.

Being available to all

We provide information, support and services for all people affected by MS. A person does not have to be an MS Society member to access our services, nor does membership give any greater entitlement to our support.

Can a restricted fund become 'unrestricted'?

Contact the Finance Support Team for advice. We will work through the process with your Finance Volunteer.

Rules 39-49 of Appendix 4: MS Society financial rules for groups cover holding funds.

4.2. Trading activities

'Trading activities' are where you charge for goods or services, or provide corporate sponsorship in return for a donation. Some types of trading activities cannot be undertaken by charities, which is why you must seek permission from our Finance Team.

When you don't need permission

- Selling donated goods
- Charging for services (including transport) provided for people affected by MS (see 'Charging for group services' below)
- Selling MSS (Trading) Ltd goods
- Selling goods manufactured by people with MS
- Trading activities at certain fundraising events (see 'Fundraising events exemption' below)

Fundraising events exemption

You can engage in trading activity at a fundraising event, provided that:

- The main purpose of the event is clearly advertised as to raise funds
- It is not a continuous activity, such as a charity shop
- Your group organises no more than 15 fundraising events in the area in a year (events that raise less than £1,000 don't count towards the 15 and you can hold as many as these as you wish)

When you do need permission

Your Finance Volunteer is responsible for obtaining permission for trading activities not listed above. These can include:

- Giving something (more than a minimal or no value token of appreciation) in return for a 'donation' – in particular in relation to companies (this is called 'corporate sponsorship')

- Allowing our logo to be used by a company in return for money or for goods or services

Find out more

Rules 12-26 of Appendix 4: MS Society financial rules for groups cover raising funds.

4.3. Charging for group services

We recommend that your group does not charge for services. If you are unable to cover the cost of providing a service, you should ask for a 'suggested donation' from service users. If a person can't afford to make a donation, they should still be given the same access to the service as those who are able to donate.

Raising invoices

Contact our Finance Support Team if a service user asks you to provide an invoice or VAT receipt. We'll do this for you.

4.4. Legacies

A legacy is when a person leaves money or property to us in their will.

It's important that we ensure solicitors and executors correctly handle a legacy that has been left to us. Our Legacy Team is here to make sure that happens.

Your Finance Volunteer is responsible for notifying our Legacy Team about any legacy left to your group, and ensuring all paperwork is sent to them. Finance Support will support your group to follow our legacy release process. If a legacy is over £20,000, the funds must be sent to MS National Centre for administration.

5. Use of funds

5.1. What should our group fund?

Your Coordinating Team is responsible for ensuring that all the services and activities your group provides:

- Align with our strategy and meet the needs of people affected by MS
- Are available to the whole MS community you serve
- Are safe and high quality

We expect you to consider these requirements when deciding how to use the funds your group holds.

Find out more

Rules 27-38 of Appendix 4: MS Society financial rules for groups cover use of group funds.

Understanding local need

This will help ensure that what you offer is cost effective and doesn't duplicate services and activities that are already provided by others. It will also mean that local people affected by MS are more likely to make full use of what your group provides.

Meeting our local priorities

We have worked with our volunteers and people affected by MS to identify our local priorities. All services and activities your group spends funds on must meet one of these priorities:

- We provide social and peer group support
- We support people with MS to be physically active
- We offer emotional support to people affected by MS
- We give information and signpost people to local services

Find out more

See B6: Planning and delivering quality services and activities for how to identify local need and plan to meet it.

5.2. Reviewing your assets

At least once a year, your Coordinating Team needs to review whether the best use is being made of the assets held by your group.

Assets include funds held, property, minibuses or other vehicles, and any other equipment you own.

Use these questions to guide your asset review:

- Are the assets being used to support people affected by MS?
- Are we simply tying up funds in land, property, vehicles or equipment? By selling these and releasing funds, could we make better use of the money?
- Are any tangible assets in good condition? Should we be planning how to replace them?

5.3. Conflicts of interest

A 'conflict of interest' is any situation in which personal interests, or the loyalty you owe to another person or organisation, could influence, or appear to influence, a decision you are involved in making.

Under our Conflicts of Interest Policy, you must declare any potential conflict of interest and ensure that you do not take part in discussions or decisions made on that subject.

Find out more

See our Conflicts of Interest Policy on the volunteer website, or ask our Finance Support Team for help.

5.4. Contributing to our wider work

If your group consistently raises more than you need to cover costs and your Coordinating Team doesn't have additional activities planned, we ask that you earmark those funds to our national work, or to helping other MS Society groups. Contact your LNO to confirm areas of work that need funding.

6. Banking and handling income

6.1. Our cash pooling scheme

We operate a cash pooling scheme with Barclays Bank to safeguard our funds and reduce administration. Your group is only permitted to bank and hold funds within an MS Society cash pooling account. Your account must include 'MS Society' or 'MSS' in the name.

Rules 12-26 of Appendix 4: MS Society financial rules for groups cover our banking and income handling arrangements.

6.2. Account signatories

Your cash pooling account must have three account signatories named on the bank mandate who are able to sign cheques. To be an account signatory, you must:

- be a member of the Coordinating Team
- not be related to another account signatory
- have full residential address details listed on our Portal
- be able to sign off our Signatory Declaration Form

To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Being an account signatory is a 'must do' task on Group Coordinator and Finance Volunteer role descriptions. Your third volunteer must have the task of being an account signatory added to their role description.

Using MS Society email

MS Society email enables your group to communicate on our behalf, whilst ensuring that we comply with current data protection legislation.

If you are an account signatory, you must use MS Society email whenever you represent us in this way. We will also use MS Society email to send important financial information to you.

We will ask you to complete Data Protection for GDPR eLearning before we set up your individual MS Society email account.

To request your individual MS Society email account, log in or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

Conflicts of interest and account signatories

Your Coordinating Team must have three unrelated account signatories to enable you to continue to make financial decisions if one of your signatories declares a potential conflict of interest.

If your group does not have three account signatories, contact your LNO for support.

Bank mandate and statement address

Your Finance Volunteer is responsible for updating your statement address and completing a bank mandate to add, remove or update account signatories. If you don't have a Finance Volunteer, your Group Coordinator must do this.

Contact our Finance Support Team to request a bank mandate.

Updating your contact details

Don't forget to make sure your bank mandate matches our central volunteer database.

We expect all volunteers to let the Supporter Care Team know if your contact details change.

For more on how our Supporter Care Team can help you, see Supporter Care Team on the volunteer website.

6.3. Account administration

Your Finance Volunteer is your Coordinating Team's main contact for day to day banking matters, with support from these sources:

Finance Support Team

Our Finance Support Team is your staff support for all account administration queries. We are here to help you to:

- Check account signatories
- Request a smartcard and PIN pad to access Barclays.net online banking
- Order a duplicate statement (do not contact Barclays)
- Order cheque books, paying in books and stop cheques
- Deal with banking and transactional queries, mandates and change of statement address forms

Online Banking

Barclays.net online banking is a simple and secure way to service your cash pooling account. You can use it to:

- View statements
- Make payments
- Order cheque books, paying in books and stop cheques

Only account signatories can access Barclays.net and each user must have a smartcard and PIN pad.

Contact our Treasury Officer to request a cheque book, paying in book, or to stop a cheque.

For contact details, see Finance Team on our volunteer website, or ask the Supporter Care Team for help.

Barclays Client Executive Team - 0800 285 1040

Our Barclays Client Executive Team is available to answer your queries, Monday to Friday, 8am – 7pm. They can help you to:

- Find out more information on statement transactions
- Check account signatories

The Client Executive Team is only able to speak to your account signatories and may transfer your call back to us if they cannot help.

6.4. Contactless payment

A contactless payment device allows donors to make card payments to your group. The iZettle contactless payment device has been approved for use by groups.

Contact our Finance Support Team to set up your contactless payment account and obtain an iZettle device.

6.5. Petty cash

Your group must ensure that you follow our financial rules on keeping petty cash. When analysing a petty cash top up in Online Accounting, you will need to show how the funds were used, and keep supporting receipts.

7. VAT

The MS Society has a single VAT registration number - 106 2344 53.

Our charitable status means that some goods and services are VAT free, or charged at a reduced tax rate. In some cases a VAT exemption certificate will need to be completed by your Finance Volunteer to avoid paying VAT.

VAT exemption certificates and queries

Contact our Finance Support Team to request the appropriate VAT exemption certificate, or for help with VAT queries.

Rules 4-11 of Appendix 4: MS Society financial rules for groups cover our accounting records and systems.

7.1. VAT exemptions available to groups

Your group should not pay VAT on advertising or fundraising items (such as pre-printed collection boxes and envelopes).

Some forms of printed materials are also VAT free. You don’t need to complete a certificate to avoid paying VAT on printed materials.

Leaflets and newsletters

Leaflets and newsletters must meet these criteria to be VAT free:

- Provides information
- Not larger than A4 size
- Designed to be held in the hand for reading by individuals
- Complete (not a part work)
- For general distribution (at least 50 copies)
- Printed on standard weight paper (i.e., not on card)

Items that are not VAT free

- Calendars
- Admission tickets
- Items for completion (area more than 25%) or return
- Posters
- Stationery (letterhead paper, envelopes, etc.)
- Photocopying

Web to Print and VAT exemption

Web to Print is an online tool that supports our groups to design and produce branded newsletters, stationery and promotional items.

Web to Print is managed centrally to enable us to pool our orders, and reduce our overall costs and administration.

When you order printed items that are not VAT free from Web to Print, the VAT charge will be administered centrally and will not be passed on to your group for payment.

To request your Web to Print account, log in or get support, see Using Web to Print on our volunteer website, or ask the Supporter Care Team for help.

7.2. Vehicles and fuel

A motor vehicle that has been substantially and permanently adapted to carry at least one wheelchair user can be purchased without paying VAT.

You can also obtain fuel and power at a reduced VAT rate of 5%, and you are exempt from paying the Climate Change Levy.

You may need to charge VAT when selling a vehicle. Contact our Finance Support Team for advice before confirming any sale.

If you do need to charge VAT when selling your vehicle, a VAT invoice must be raised by the Finance Team.

For contact details, see Finance Team on our volunteer website, or ask the Supporter Care Team for help.

7.3. VAT exemptions available to disabled people

Disabled people can claim VAT exemption on a range of items. If your group awards grants, your Finance Volunteer may be asked to complete an exemption certificate when administering grant payments for VAT free items.

Disabled people should not have to pay VAT on the following:

Adjustable beds, chairlifts, hoists and sanitary devices

- Electrically and mechanically adjustable beds that have been specially designed for use by a disabled person
- Chair lifts and stair lifts used in conjunction with wheelchairs

Medical and surgical appliances

A medical or surgical appliance designed for a person with a specific disability. For example, a custom built wheelchair.

Alarms

Emergency call systems designed for disabled people for their personal use, to enable them to call for help.

Building works

Provided the work is done in the personal residence of a disabled person and it helps them to move around, the following services can be VAT free:

- Widening of existing doorways
- Construction of a ramp
- Bathrooms, washrooms, shower rooms and lavatories, provided the units are purchased from the company that is doing the building work and not from a shop. This includes any extension or adaptation work carried out to suit the disabled person.

The supplier must be notified of any VAT exemption prior to works being contracted, as they will need a completed copy of the VAT exemption certificate before they purchase any building materials.

There are also general exemptions to VAT on the construction of new private dwellings.

Motor vehicles

A disabled person who uses a wheelchair may purchase a permanently adapted motor vehicle without paying VAT, provided it meets these criteria:

- The vehicle must be purchased for the domestic or personal use of the wheelchair user
- The vehicle must seat no more than 12 people
- The vehicle must be adapted to enable the wheelchair user to enter, drive or travel in the vehicle

A second-hand adapted vehicle can also be purchased VAT free.

What vehicle adaptations qualify?

- A swivel seat
- A hoist to lift a wheelchair into or onto the vehicle
- A box for the wheelchair, which is fitted to the top or the back of the vehicle
- Adaptations that enable a wheelchair user to drive the vehicle, such as a push/pull brake and accelerator, hand controls or other aids that operate the primary driving controls
- Infrared control unit that operates the secondary controls

Parts and accessories

Any integral parts or accessories for the items that were purchased without paying VAT also qualify for relief, though standard batteries are not included. Only batteries specifically designed for use in the above items can be purchased without VAT.

Repair and maintenance of goods

The cost of repair and maintenance of the goods listed above can also be VAT free.

8. Gift Aid

8.1. What is Gift Aid?

Gift Aid allows charities to claim back money from HMRC for donations from UK tax payers. We can get 25p back for every £1 donated - a substantial amount of money!

Our Supporter Engagement Team claims Gift Aid on eligible income received directly from donors and supporters. Gift Aid claimed on funds that have been earmarked for your group is included when we transfer the money to your account.

Your Finance Volunteer is responsible for claiming Gift Aid on 'eligible income' received directly from donors and supporters.

8.2. Eligible income

We can only claim Gift Aid on eligible income. This includes funds that:

- Are personal gifts from a known individual
- Were received within the last four years
- Are supported by a correctly completed and signed Gift Aid Declaration Form or MS Society Sponsor Form
- Are supported by a Gift Aid Declaration Letter sent to confirm a verbal Gift Aid agreement

Find out more

Download a Gift Aid Declaration Form, Gift Aid Declaration Confirmation Letter, or MS Society Sponsor Form on our volunteer website, or ask the Supporter Care Team to send you printed copies.

Supporters must include their full name and home address on their declaration or sponsor form – we can't claim Gift Aid on a donation linked to an incomplete declaration, or from a business address.

8.3. What you can claim Gift Aid on

- General donations paid directly to your group
- Membership subscriptions paid directly to your group
- Sponsorship income from individuals
- 'In memory' donations from known individuals
- Regular bank credits or direct debits

8.4. What you can't claim Gift Aid on

- Funds received over 4 years ago
- Funds received centrally and transferred to your cash pooling account
- Collection boxes
- Raffle tickets
- Anonymous donations
- Income where the donor has received goods or services in return for a donation

- Trading income
- Legacies
- Overseas gifts
- Gifts from charitable companies
- Grants

Online Accounting and Gift Aid

HMRC requires an audit trail to show that a claim relates to a specific donation that can be traced back to a specific individual. Online Accounting enables your Finance Volunteer to meet this requirement.

To claim Gift Aid on eligible income, your Finance Volunteer must create 'donor records' in Online Accounting and link eligible income ('gift records') to them. You must keep all Gift Aid declaration forms and letters, and sponsor forms on file for seven years from the date of the claim.

8.5. Your HMRC registration

To claim Gift Aid, your group must have its own Charities Reference Number, issued by HMRC.

Contact our Gift Aid and Operations Manager for help to set this up if your group hasn't claimed Gift Aid before.

Find out more

For contact details, see Finance Team on our volunteer website, or ask the Supporter Care Team for help.

To update your group or authorised user details, complete online form ChV1 on the HMRC website.

Group Handbook B4: Managing your finances v3.3	
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Sign off:	Head of Local Networks
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B5: Fundraising

In this section

If your group handles money and delivers services and activities, one of your requirements is to raise enough funds to cover the cost of your services and activities, as a minimum.

Fundraising and your role

Your group may choose to recruit one or more volunteers to coordinate and support your fundraising activities:

- Fundraising Volunteer
- Shop Volunteer
- Fundraising Events Volunteer

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

1. Our fundraising standards

The Fundraising Regulator sets and maintains the standards for charitable fundraising in the UK.

Our registration with them confirms our commitment to legal, open, honest and respectful fundraising, and allows us to display their logo on our fundraising materials.

See A4: Our legal identity, policies and rules for more on our fundraising registration.

1.1. Code of Fundraising Practice

The Fundraising Regulator holds the Code of Fundraising Practice for the UK. All of our fundraising activities must comply with this code, including how we deal with complaints about fundraising.

See Appendix 5: Code of Fundraising Practice in summary for an overview of what is covered.

We have several resources that help us meet the Code of Fundraising Practice.

Supporter Promise

Our Supporter Promise lists our key fundraising principles. We recommend that you display it at fundraising events and give it to donors, where appropriate.

MS Society Sponsor Form

Our Sponsor Form includes everything you need to comply with the Code of Fundraising Practice whilst you collect sponsorship for either a national or local group fundraising activity. Don't forget to add your details to the group sponsorship form.

Fundraising Complaints Form

Use our Fundraising Complaints Form if somebody makes a complaint about fundraising 'on behalf of', or 'in aid of' your group.

Fundraising support

Area Fundraisers (AFs) in England and Scotland, and National Fundraising Managers in Northern Ireland and Wales work with MS Society groups and community volunteers to develop fundraising activities and projects to increase our income. They focus on innovative activities and those that need specialised support.

The Supporter Care Team is your source of support for most fundraising matters, but this section will tell you when you should contact your Area Fundraiser or National Fundraising Manager for specialist help.

See Fundraising Support on our volunteer website, or ask the Supporter Care Team for help.

1.2. Ethics, transparency and accountability

Our fundraising standards inform the five important ethical principles we must follow when fundraising for the MS Society - honesty, respect, integrity, empathy and transparency.

We are responsible for our actions and must be able to explain, clarify and justify them if necessary.

Donors have a right to know how their contribution towards our work is spent, and can hold the MS Society to account in this regard.

We must therefore be transparent - meaning that we are open, frank and honest in all communications, transactions and operations.

For our full range of fundraising support resources, see Effective Fundraising on the volunteer website, or ask our Supporter Care Team for help.

2. MS Society fundraising merchandise

As an MS Society fundraiser, you have access to our range of branded fundraising merchandise. Our range includes items you need to ensure your activities meet our legal requirements.

For example, you can order free collector authorisation cards to make sure your collectors are identifiable, and free collection tins with seals to protect your group from cash handling concerns.

2.1. Online Shop

Our Online Shop stocks MS Society information resources and branded merchandise. All MS Society groups that handle money have an Online Shop account for ordering MS Society materials.

To log in to your Online Shop account or get support, see Using our Online Shop on the volunteer website, or ask the Supporter Care Team for help.

3. Keeping fundraising legal and safe

If you fundraise as part of an MS Society group, you must have a solid grasp of these key issues to keep our fundraising legal and safe.

3.1. 'On behalf of' versus 'in aid of' fundraising

Fundraising ‘on behalf of’ your group is where a volunteer or member organises an activity or event on your group’s behalf. When other people get together and raise money for your group, this is ‘in aid of’ fundraising.

This difference is important as it affects your legal, and health and safety obligations.

‘On behalf of’ fundraising

- You have control over how you fundraise and how much you raise
- You can access free fundraising materials to support your activities
- You can use our Web to Print system to produce posters and leaflets
- You can use our logo
- You are covered by our insurance

‘In aid of’ fundraising

- The fundraiser organises their own activities
- You can provide them with our ‘in aid of’ MS Society logo to use
- They retain liability for their own safety
- They and any guests are not covered by our insurance and are advised to arrange cover for their activity
- You don’t get involved in organising the activity, but you might provide fundraising materials

Find out more

Download a version of the MS Society Logo on our volunteer website, or ask our Brand Centre for help.

3.2. Representing the MS Society

You must refer to us as the Multiple Sclerosis Society or, more usually, the MS Society, or MS Society plus nation suffix (e.g. MS Society Scotland) and include our charity and company registrations on any documents.

Find out more

See A4: Our legal identity, policies and rules for our registration details.

3.3. Licences

You are likely to need a licence if your fundraising involves any of these activities:

- Providing alcohol or entertainment (including recorded music)
- Holding a raffle or lottery

- Doing any sort of collection in a public place
- Putting up banners or signs in public areas

You must contact your local authority licensing department for advice. Our Supporter Care Team can help with this.

For more on how the Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

3.4. Health and safety

All fundraising activities organised 'on behalf of' the MS Society must be covered by a risk assessment or our events risk guidance, and be insured.

See A5: Health, safety and wellbeing for information on our risk management system and insurance details.

3.5. Handling data

You must only use data collected on sponsorship forms for the purpose of collecting funds and claiming Gift Aid.

See A6: Handling data for your responsibilities when handling personal data.

4. Financial matters

If you volunteer to fundraise as part of an MS Society group, you must understand the following financial matters:

- Our income handling rules
- Gift Aid – how to promote and maximise income
- Earmarking of funds from national offices
- Restricted funds
- Trading activities
- VAT exemptions available for fundraising materials
- Corporate sponsorship

See B4: Managing your finances for more on your group's financial responsibilities.

4.1. Applying to trusts

You can apply to local trusts where we are not able to apply nationally. Most trusts only make one grant at a time, so you must discuss your application with your Area Fundraiser or National Fundraising Manager, to ensure we don’t duplicate our efforts.

Find out more about Applying to a Local Trust on our volunteer website, or ask your Area Fundraiser or National Fundraising Manager for help.

5. Contributing to our wider work

If your MS Society group consistently raises more than it needs to cover costs and you don't have additional activities planned, we ask that you earmark those funds to our national work, or to helping other MS Society groups.

Speak to your Area Fundraiser or National Fundraising Manager to confirm areas of work that need funding.

5.1. Donating to research

We have to be careful that we make the best use of MS Society funds by supporting only the most relevant and highest quality research, and that we don’t put people with MS in danger by supporting poor quality research.

If you are approached directly by researchers for funding, or hear of a research project you like, you must contact our Research Team so they can put the proposal through our formal application system.

All research projects supported by us have to go through our formal application and review process, which has expert input from leading researchers and people affected by MS.

See Appendix 2: Sources of support for staff contact details.

Group Handbook B5: Fundraising v3.3	
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B6: Planning and delivering quality services and activities

In this section

If your group handles money and delivers services and activities, it is a requirement that all the services and activities you provide must:

- Align with our strategy and meet the needs of people affected by MS
- Be available to the whole MS community you serve
- Be safe and high quality

Your Coordinating Team shares responsibility for meeting this requirement, but you may choose to recruit one or more Activities Organiser volunteers to lead on developing quality services and activities.

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

1. Understanding local need

Before your group decides to deliver a new service or activity, it is important to understand what is needed locally. This will help ensure that what you offer is cost effective and doesn't duplicate services and activities that are already provided by others.

It will also mean that local people affected by MS are more likely to make full use of what your group provides.

Understanding the needs of your local MS community should be an ongoing priority for your Coordinating Team. This knowledge will:

- Inform the planning process
- Help your group to decide between options
- Support you to share your results and plan again

See C3: Your Coordinating Team for how your group should operate.

Who can help us to understand what is needed?

- Our staff
- MS professionals
- Our members
- Wider MS community

1.1. Regional/External Relations Officers

Our Regional/External Relations Officers (R/EROs) work throughout the UK to influence change for people affected by MS. They build relationships with decision makers and professionals to ensure effective treatment and care exists for people affected by MS. Contact your R/ERO to find out about any local issues they have identified.

For contact details for your R/ERO, see Regional/External Relations Officers on our volunteer website, or ask the Supporter Care Team for help.

1.2. Local Networks Officers

Your Local Networks Officer (LNO) is your main contact, supporting your group to develop and offer safe, effective services and support for people affected by MS. Your LNO will know what is working elsewhere and can help you to decide how best to meet the needs of your local MS community.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

1.3. Our members

As a group that handles money and delivers services and activities, you have access to contact information for our members within the area who have agreed for their details to be shared with you.

See A6: Handling data for your responsibilities when handling information on our behalf.

You can use this information to give members the opportunity to review current services and activities, and take part in planning for the year ahead. This could be in person at a group meeting, or in the form of a survey you send out by post or email.

Find out more

See B1: Availability, contact and communication for more on contacting members in the area.

1.4. MS professionals

Your local MS nurse can be a useful source of information and may help you to get the views of the local MS community about services and activities they would like to see delivered locally.

1.5. Your wider MS community

We're here for everyone affected by MS. Our groups support large numbers of people but there are others we don't always reach. We need to make sure that our work is inclusive and that we actively work to engage with as much of the MS community as possible.

People affected by MS may use other local services and activities, such as therapy centres, accessible exercise classes or carers groups.

Consulting with these groups will increase your reach, improve your understanding of local need, and ensure that you do not duplicate services and activities that are already available.

Planning and budgeting

This information all helps your Coordinating Team to plan, budget and develop the services and activities you deliver locally.

Find out more

See B4: Managing your finances for guidance on planning and budgeting.

2. What should we offer?

We only offer services and activities that are safe, effective and have a positive impact on those using them.

We have worked with our volunteers and people affected by MS to identify our local priorities. All services and activities you provide must meet one of these priorities.

Our local priorities

- We provide social and peer group support
- We support people with MS to be physically active
- We offer emotional support to people affected by MS
- We give information and signpost people to local services

2.1. Services for young people under 18

We do not actively provide or promote services to young people under the age of 18. However, we do not want to exclude young people from accessing services that would be beneficial to them.

If a young person enquires about using a service your group provides, or you are considering developing a service for young people, you must contact our Quality and Safeguarding Manager for advice. An individual assessment of each request must be made before you proceed.

See Appendix 2: Sources of support for staff contact details.

2.2. Personal care

People with MS must be able to use our services and activities knowing that they will be treated with dignity and respect, and that they will have access to the personal care they need.

In most cases, personal care should be provided by a person’s own carer, who may be a family member or a paid carer. However, if you organise a service or activity that aims to give primary carers a break, your group must supply contracted care assistants to provide personal care.

We don't expect our staff and volunteers to provide personal care and you must not do so on our behalf.

Learn about your responsibilities under our Personal Care Policy on the volunteer website, or ask your LNO for help.

3. Clinical services and complementary therapies

We have an agreed set of definitions and criteria that must be met before clinical services or complementary therapies can be funded or directly delivered by our groups.

3.1. Clinical services

We define clinical services as, "healthcare services which relate to the direct treatment of a person to alleviate their symptoms of MS."

Clinical services criteria for delivery

- Delivered by a competent professional with a standardised Service Level Agreement (SLA)
- Not a duplication of existing NHS service delivery or services the NHS is expected to deliver
- Based on evidence of need and impact
- Meets our principles of quality service delivery
- Centred on the individual needs of each person, not a 'one size fits all approach'
- Delivered as a purposeful intervention with goals so we can measure the outcomes
- Enable people with MS to move between joined up treatment, care and support that is right for their needs and provided by the organisation best able to deliver this service at the right time

3.2. Complementary therapies

We define complementary therapies as, "therapies which have been developed outside of mainstream medical and scientific thinking which are used in addition to healthcare services, as well as by people with no specific condition."

Complementary therapies criteria for delivery

- Delivered by a competent professional with a standardised Service Level Agreement (SLA)
- Meets our principles of quality service delivery
- We will not provide or fund complementary therapies where there is a reasonable (even if low) risk of harm to individuals, no clear evidence of benefit and no likely impact on overall wellbeing
- When deciding how much to invest in funding complementary therapies, we expect your group to consider likely impact and reach of these services, the cost of providing them and other demands on your resources

3.3. Local campaigning

Your group must consider existing NHS provision when planning and reviewing services.

If the NHS service provided doesn’t meet the needs of people with MS in your area, or is not readily accessible, it may be more appropriate to campaign for improved NHS provision locally before committing resources to setting up our own service.

We’ve developed a Local Campaigning Toolkit to help you to do this.

Find out more

See our Local Campaigning Toolkit on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

4. Delivering quality services and activities

We need to make sure that what we are delivering locally through our groups is of benefit to people affected by MS and meets their needs (is impactful).

We want to ensure that wherever people access our services and activities, they can be confident that they are receiving good quality.

Find out more

See Providing Quality Services and Activities on the volunteer website, or ask your Local Networks Officer for help.

4.1. Our principles of quality service delivery

We have five principles of quality service delivery that we expect your group to meet as you offer support, give information, and provide local services and activities in your community.

Find out more See Delivering Quality Services on the volunteer website, or ask your Local Networks Officer for help.

Accessible to all

Depending on the service or activity, accessibility could mean that a venue has disabled parking spaces and toilets, or that it is available by phone as well as face to face.

Accessibility also means making sure services and activities are widely publicised, and that transport is available, if required.

Find out more See B1: Availability, contact and communication for guidance on promoting your services and activities.

Impactful

The impact of a service or activity is the difference it makes to people that use it. We will ask you to help us measure the impact of services and activities from time to time.

Safe

All services and activities must have a current risk assessment in place, and volunteers involved in delivering services and activities must be able to apply our safeguarding and personal care policies and processes.

Find out more See A5: Health, safety and wellbeing for risk management, safeguarding and personal care guidance.

Safeguarding risk guidance documents

Our safeguarding risk guidance documents identify potential safeguarding concerns that may arise when your group provides services and activities.

Use them to help you plan and deliver services and activities that are safe for everyone who attends.

See our Safeguarding Risk Guidance on the volunteer website, or ask the Supporter Care Team for help.

Professionally delivered

Your group needs to ensure that certain services and activities are delivered by an individual or organisation that is qualified, insured and registered with the appropriate professional body.

Our SLA template will support you to do this.

Regularly monitored, evaluated and improved

Monitoring and evaluating our services and activities is about what we do and who we reach.

This may include the register completed by one of our volunteers at a social get together, demographic information gathered by a service provider about the people using a clinical service, and asking the people who use your services and activities what they think of them and whether we continue to meet their needs.

4.2. Service level agreements

A Service Level Agreement (SLA) is a two-way written agreement that defines the services and the quality you expect your MS Society group will receive from a service provider.

For our SLA template and frequently asked questions, see Service Level Agreements on our volunteer website, or ask your LNO for help.

You must set up an SLA for each service provided for people with or affected by MS that is delivered on behalf of your group by a professional or business provider. A ‘professional or business provider’ is an individual or organisation operating as a business, or freelancing outside of their main employment but within the area they specialise in.

We expect your group to use our SLA template to set up this agreement.

An SLA must not be used to engage a person to carry out an administrative or organisational function for your group that is being fulfilled elsewhere by one or more recognised MS Society group volunteer roles.

See our full list of recognised Group Roles on the volunteer website.

Involving your Local Networks Officer

Your LNO is here to support you to develop good quality services and activities. You must involve your LNO if you plan to develop any service or activity that requires an SLA.

5. Services and activities on the Portal

The ‘services and activities’ tab on the Portal is our record of all services, activities and events delivered by MS Society groups throughout the UK. This is where you should tell us what you provide for people affected by MS.

We expect your Coordinating Team to add, review and edit the information held about your group's services, activities and events on the Portal annually, but also if anything changes in between reviews (so your information is kept up to date).

We will use this record to promote local services on our website and confirm that the appropriate level of risk management has been completed.

To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Group Handbook B6: Planning and delivering quality services and activities v3.3	
Content Owners:	Local Networks Transformation Manager Quality and Safeguarding Manager
Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
Review date:	October 2020

Part C: Running your group

C1: Volunteering with us

In this section

1. Understanding your volunteer needs
2. Finding and recruiting volunteers
3. Agreeing the role
4. Welcome, induction and ‘must do’ training
5. Supporting you in your role
6. Recognising volunteer contributions
7. When a volunteer leaves

Our volunteers deliver a huge proportion of our activity and are integral to our impact on the lives of people affected by MS.

A volunteer includes anyone who performs a role on our behalf without payment beyond having their expenses reimbursed.

We can only offer volunteering opportunities for individuals who are aged 18 or over.

Find out more

See our Volunteer Involvement Policy on the volunteer website, or ask our Supporter Care Team to send you a printed copy.

Our Volunteering Programme holds the prestigious Investing in Volunteers (IiV) accreditation.

This award recognises our dedication to ensuring all volunteers have an excellent experience – from when we recruit you, through supporting you to develop skills and experience, to recognising your achievements.

We call this the ‘volunteer journey’ and we’ve identified seven steps we take together.

Find out more

For our full range of volunteering resources, see Volunteering With Us on our volunteer website, or ask the Supporter Care Team for help.

Involving volunteers in our work

Leading us

We are led by volunteers who ensure we strive to improve the lives of people affected by MS through our strategy and goals.

Shaping our work

Volunteers with MS are involved in all our work to make sure we always meet the needs of our MS communities.

Raising vital funds

Our fundraising volunteers support us to raise vital funds for research and local services across the UK.

Making sure no one faces MS alone

Volunteers offer support on the telephone, face to face and online to make sure no one has to face MS alone.

Sharing skills

We involve volunteers to help us achieve our organisational goals, while offering individuals opportunities to develop skills and experience in people and project management.

Getting loud about MS

Our volunteers campaign, engage, and coordinate activities and communications to raise our profile and influence change.

1. Understanding your volunteer needs

Before we think about recruiting volunteers, we need to understand which of our organisational goals they will help us meet.

Find out more See A1: Introduction and overview for our organisational goals.

Your group may provide an opportunity to meet together every so often, you may want to help raise funds for us, or you may deliver services and activities for people affected by MS. You may need volunteers to continue to deliver some of these activities, or you may want to recruit people to start something new.

See B6: Planning and delivering quality services and activities for guidance on how to identify local need.

1.1. Planning to recruit

We need to make sure we have support in place for potential new volunteers. This includes agreeing a clear role for them to take on, someone to welcome and induct them, and budget for any expenses they may incur.

Before you recruit

- Plan how new volunteers will support group services and activities
- Work out how many volunteers you need
- Identify which role(s) you need from our role descriptions
- Decide what skills and experience are essential
- Agree what information to give to potential volunteers

1.2. Our local groups

Volunteers in our hundreds of local groups are vital to ensuring services, information and support are available to MS communities throughout the UK.

Click on any link to go to the role page.

Our group roles

- Group Coordinator
- Activities Organiser
- Administration Volunteer
- Fundraising Volunteer
- Health and Safety Volunteer
- Lead Support Volunteer
- Property Volunteer
- Support Volunteer
- Volunteer Driver
- Finance Volunteer
- Activities Volunteer
- Communications Volunteer
- Fundraising Events Volunteer
- Information Events Volunteer
- Passenger Assistant
- Shop Volunteer
- Transport Volunteer

Developing new roles

Only our Volunteering Team can create new roles; we need to assess all potential roles during the planning stage of the volunteer journey to ensure we always meet our legal requirements.

Volunteering Team
volunteering@mssociety.org.uk
Tel: 0300 500 8084

2. Finding and recruiting volunteers

There are lots of places to find new volunteers, from advertising online to asking someone you already know if they would like to get involved. Think about where you might find people with the skills and experience you need and put together an advert.

2.1. Our recruitment resources

We recruit all group roles using Online Recruitment or our paper Volunteer Application Form, and our role descriptions and recruitment guidance.

We make our selection based on whether a role meets an applicant’s aspirations, is within their capabilities, and suits the time they want to give us.

Each role description has an accompanying ‘role specifics template’ that we want you to complete. Use this template to give potential volunteers the specifics of your vacancy, such as:

- Your group location and details
- How much time the role is likely to involve
- Details of the particular service they will support
- Which volunteer team they will be joining

Find out more

For our role descriptions and recruitment guidance, see Organising Your Team on the volunteer website, or ask our Supporter Care Team for help.

2.2. Online Recruitment

Online Recruitment is an online tool that enables our staff and volunteers to advertise vacancies on external websites as well as our own volunteering opportunities web page. You can manage the entire process online, from tailoring your advertisement and promoting your vacancy, to confirming a successful candidate in a role.

To set up your Online Recruitment account, log in or get support, see Using Online Recruitment on our volunteer website, or ask the Volunteering Team for help.

Handling application paperwork

We are all responsible for protecting the privacy of individuals and their right to control the ways we use their personal information. All potential volunteers must apply via Online Recruitment or by completing our paper Volunteer Application Form to enable us to agree with them how we will use their data.

If you use Online Recruitment, your applicants' personal data is stored securely on our system.

If a candidate who submitted a paper application form is successful, either email or post it to our Supporter Care Team. If you don't recruit them, you must dispose of their application form by shredding or burning it.

See A6: Handling data for our guidance on disposing of personal data.

2.3. Who is responsible for recruitment?

Group Coordinators are recruited by your Local Networks Officer and an appropriate volunteer, using the role description to assess their skills and experience.

Once recruited, your Group Coordinator has overall responsibility for recruiting, selecting and inducting group volunteers.

However, they may choose to share this task with others. For example, if your group offers MS Support, a Lead Support Volunteer may coordinate Support Volunteer recruitment, depending on the needs of your local MS community.

See D1: Offering MS Support for our priorities, ways of working and how we help our groups to offer a local MS Support service.

2.4. Selecting a suitable candidate

When we receive a person's application, we need to consider if they are suitable for the role they are applying for. This will be based on whether the role meets their motivations and aspirations, is within their capabilities, and suits the time they want to give.

Your selection process should always include a review of their application form. It might also include an informal conversation with the applicant.

2.5. Disclosure checks

As part of our wider commitment to safeguarding, people in particular volunteer roles or who undertake certain activities at the MS Society are required to have a disclosure check as part of their recruitment process.

See C2: Disclosure checks for the disclosure process and our roles that must have a disclosure check.

3. Agreeing the role

Before a volunteer gets started in a new role, we set out what a volunteer can expect from us, and what we expect from them.

Our shared commitments reflect our organisational values, our Code of Conduct, and our dedication to equality, diversity and inclusion.

Our shared commitments

Whether your volunteering journey with us is long or short, we all make these commitments, so everyone knows what to expect.

We promise to:

- Offer you a role that fits with your life
- Keep you and everyone safe
- Welcome you as an individual
- Reimburse your out of pocket expenses
- Help you learn your role and support you to learn as you go
- Listen to your feedback and welcome your ideas
- Value your personal contribution
- Keep you connected and up to date
- Thank you for the impact you deliver

We ask that you:

- Respect the boundaries of your role and our Code of Conduct
- Keep yourself and others safe
- Value the contribution of others and welcome the differences between us
- Recognise the limits of your experience and expertise
- Complete the necessary learning for your role
- Express your ideas
- Contribute positively to our story
- Stay connected and up to date
- Share your successes and learning

See A3: Our values and how we deal with problems for how we put these commitments into practice.

3.1. Equality, diversity and inclusion

We seek to have an open and effective culture where discrimination does not exist, equality is promoted, and diversity is embraced. We are clear that MS does not discriminate – nor should we.

Our volunteers bring with them rich and varied expertise and experience, including of living with MS. We are committed to ensuring our volunteer roles enable everyone who wishes to volunteer with us to use their skills, knowledge and experience.

Your Local Networks Officer (LNO) is available to work with you to support volunteers with access requirements.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

3.2. Taking a personalised approach

Each of our volunteer role descriptions includes a list of tasks. During recruitment and selection, you can choose to remove any tasks that a volunteer either doesn't want to do, isn't equipped to carry out, or that someone else is already doing.

Sharing roles

How the various tasks in a role description are shared between volunteers is up to the recruiter and the person considering the role. For example, our Activities Organiser role could be split between two or three people if that's what works for your group and the range of activities you deliver.

Exceptions

Your group must not split either the Group Coordinator or Finance Volunteer role between more than two people. This is to ensure the volunteers taking on these roles have adequate oversight of the tasks they share.

Volunteers with more than one role

In addition to their main role, a volunteer may take on additional roles or tasks to support another group function. You should work through the appropriate role description and Welcome and Induction Checklist (see below) to ensure they understand what the additional role involves and the support available to them.

All volunteers who carry out tasks on a particular role description must complete the ‘must do’ training and disclosure checks required of that role.

Your Group Coordinator is responsible for ensuring that particular tasks are covered by someone and that each volunteer’s wellbeing is considered before they take on additional responsibilities.

4. Welcome, induction and ‘must do’ training

4.1. Welcome and Induction Checklists

We want all volunteers who are new to a role to know what to do and who can help, right from the start. We’ve created a Welcome and Induction Checklist tailored to each role, including links to key information to help you settle in and understand how your contribution helps us meet our organisational goals.

Find out more

For your Welcome and Induction Checklist, see your role page at Our Volunteer Roles on our volunteer website, or ask the Supporter Care Team to send you a printed copy.

Welcome to the MS Society

Our Welcome Booklet and video are for all volunteers newly joining us. These resources form part of your welcome and induction which will help you find about what we do and what volunteering with us is like.

They include information about who we are, our commitments to you and our expectations, our approach to learning and development, and an explanation of our policies.

See Welcome to the MS Society on our volunteer website, or ask the Supporter Care Team to send you a printed copy.

4.2. 'Must do' training

Some of our volunteer roles and tasks require 'must do' training before starting.

This could take the form of an online module such as Data Protection for GDPR eLearning, which you must complete if you take on certain roles and tasks, or before you can sign up for Online Recruitment, access personal data on the Portal, or use MS Society email (see page 127).

'Must do' training can also be face to face, like our Support Volunteer Training for Lead Support Volunteers and Support Volunteers.

Failure to complete 'must do' training

We reserve the right to remove an individual from their volunteering relationship with us if they fail to complete 'must do' training.

4.3. Volunteers on the Portal

The 'volunteers' tab on the Portal is our record of all MS Society volunteers delivering impact throughout the UK. This is where we keep track of who volunteers for your group, what other roles they have held, any 'must do' training they have completed, and the status of their disclosure check (if required).

To set up your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

This information helps your Coordinating Team to plan services and activities, and ensure your volunteers meet our legal requirements.

Keeping us informed

Whenever you recruit a new volunteer, or an existing volunteer changes role, you must contact the Supporter Care Team to update our central volunteer database.

For more on how the Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

4.4. Who can access volunteer data?

You can only access the ‘volunteers’ tab on the Portal if you are in a volunteer role that is authorised to do so.

Roles with access to personal data about our volunteers on the Portal are:

- Group Coordinator
- Administration Volunteer
- Finance Volunteer
- Communications Volunteer

Data Protection for GDPR eLearning

Some of our volunteer roles and online tools require you to complete our Data Protection for GDPR eLearning.

This training includes a multiple choice test that will demonstrate that you can apply our legal obligations when processing personal data on our behalf.

See A6: Handling data for your responsibilities when handling personal data.

5. Supporting you in your role

We want you to feel supported in your role, and to have regular opportunities to develop your skills and experience.

We will keep you informed about pilot projects, volunteer vacancies, and new learning and resources as we develop them. We will encourage you to share your successes and challenges, and recognise the contribution your volunteers make.

For more on the ways we support you in your role, see Supporting Our Volunteers on the volunteer website, or ask the Supporter Care Team for help.

5.1. Role specific learning

Role specific learning can include online tutorials, support and wellbeing calls or events you are invited to attend in person. Your role page includes information about role specific learning and we will tell you when new opportunities become available.

Your role page

Your role page on the volunteer website includes the following:

- Role description, including a list of tasks
- Welcome and induction checklist
- Links to key resources
- Role specific learning opportunities

For a quick link to your role page, see A-Z: Our Volunteer Roles on our volunteer website.

5.2. Regular reviews

We want you to share feedback about your volunteering, both informally within your group, and more formally at reviews with your recruiter.

As an MS Society group volunteer, we expect you to take part in a three yearly role review. Role reviews are an opportunity for you and your Group Coordinator to discuss your volunteering experience and ensure that the role is still right for you and the group.

New and existing volunteers

New volunteers should have their first review after six months. This review is to 'check in' with the volunteer to ensure they have settled into the role, have completed their induction and agree any further support.

We don't expect existing volunteers who have moved to a new role to have a review after six months, but they should have the opportunity to discuss how they are finding their new role if they request it.

5.3. Sharing your successes and challenges

Our resources are finite and we need to be an effective and efficient organisation to meet our goals. Sharing our successes and challenges helps all of us to do better. Hearing from our volunteers about the difference groups are making locally helps us to understand and showcase the impact we have together.

We want you to keep in touch with your LNO so they can use your experience to support other groups. We may contact you for permission to include your story in Teamspirit (see below).

Find out more See A7: Keeping in touch for your LNO's contact standards.

5.4. Teamspirit

Teamspirit is our bi-monthly volunteer newsletter, sent to your MS Society email and directly to members of your Coordinating Team. It is available online for everyone to read.

Teamspirit keeps you up to date with essential news and information to run your group. We'll use Teamspirit to tell you about any changes we're making, and invite you to apply for inclusion and participation roles to help us develop new projects and ways of working.

Find out more For current and back issues, see Teamspirit on our volunteer website, or ask the Supporter Care Team to send you printed copies.

Updating your contact details

We use the information we hold about our volunteers on the Portal to send Teamspirit and other information about your role so it is vital that you keep your contact details up to date.

Let the Supporter Care Team know if your volunteer role or contact details change so you don't miss out.

5.5. Meetings with others

Throughout the year, your LNO will organise opportunities for you to come together with other groups and volunteers.

These meetings help you keep up to date with what's happening in your area and the wider MS Society. They are a great opportunity to share ideas and get support from volunteers in other groups.

See Volunteer Events on our volunteer website, or ask the Supporter Care Team about upcoming events.

5.6. Expenses

We pay all reasonable out of pocket expenses that you may incur during the course of volunteering with us. Complete an expenses form, attach the receipts and give it to a member of your Coordinating Team to be reimbursed.

Download an expenses form at Claiming Expenses on our volunteer website, or ask a member of your Coordinating Team for a printed copy.

6. Recognising your contributions

We recognise that without the contribution of volunteers, we would only be able to achieve a small percentage of our work. We want you to celebrate the passion and dedication of people who make a difference in your MS community.

See Recognising Volunteer Contributions on our volunteer website, or ask the Supporter Care Team for help.

6.1. Thank you cards

Sending a thank you card is a quick and easy way to make your volunteers feel valued and appreciated. You can order free of charge thank you cards from our Online Shop.

To log in to your Online Shop account or get support, see Using our Online Shop on our volunteer website, or ask the Supporter Care Team for help.

6.2. Certificates of appreciation

This certificate acknowledges a volunteer contribution made to your group. Your Coordinating Team decides who receives a certificate of appreciation and how frequently you award them. You can order free of charge certificates from our Online Shop.

6.3. Shining Star Awards

This lapel pin and certificate recognises outstanding individual or group contributions by volunteers. Any volunteer can nominate a worthy volunteer or group of volunteers to be awarded your group’s annual Shining Star Award.

See How To Nominate A Shining Star on our volunteer website, or ask the Supporter Care Team to send you a printed nomination form.

7. When a volunteer leaves

When the time comes for a volunteer to leave us, we all follow our exit process to ensure they know their time and commitment has been appreciated, and to remove them from any MS Society systems they no longer need to use.

We also give them the opportunity to give us feedback on volunteering with us, and advise that if they request one, we can provide a reference.

7.1. Closing a volunteer record

You must be mindful of our data protection responsibilities when a volunteer leaves. As part of our exit process, you must contact our Supporter Care Team to close their volunteer record as soon as possible. This will ensure the leaving volunteer no longer has access to our online tools (including MS Society email, Online Accounting, Online Recruitment, Portal and Web to Print), and other systems.

Supporter Care Team
supportercare@mssociety.org.uk
Tel: 0300 500 8084

See A2: Requirements, support, tools and resources for more on our online tools.

Changing your passwords

If a leaving volunteer has access to any shared resources (such as your Online Shop account), you will need to change your account passwords when they leave.

Finance Volunteers and other account signatories

If a Finance Volunteer or another account signatory leaves, you must also contact our Finance Support Team to update the following:

- Bank account signatories
- Correspondence address (Finance Volunteer only)
- HMRC Gift Aid registration (Finance Volunteer only)

See B4: Managing your finances for more on your group’s financial responsibilities.

7.2. Giving us feedback

When our Supporter Care Team closes a record, volunteers who are leaving receive a thank you email inviting them to complete a short online survey. A thank you letter and a copy of the survey are posted to volunteers without an email address.

7.3. Providing a reference

A volunteer may ask us to provide a reference to support them to start training, employment or study. This should normally be provided by the volunteer or staff member who knows the individual best.

We only provide factual references. You must not give a subjective character reference on our behalf.

See our guide to Providing a Volunteer Reference and download a Volunteer Reference Letter Template on the volunteer website, or ask the Supporter Care Team to send you printed copies.

Group Handbook C1: Volunteering with us v3.3	
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Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
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C2: Disclosure checks

In this section

1. What is a disclosure check?

As part of our wider commitment to safeguarding, volunteers in particular roles at the MS Society may be required to have a disclosure check as part of their recruitment process. This applies to all new volunteers and current volunteers if they take on a new role that requires a check.

Disclosure checks must be renewed every three years.

See A5: Health, safety and wellbeing for more on dealing with safeguarding concerns.

Roles that require a disclosure check, and the process you must follow vary, depending on where you are in the UK. We have separate policies for England and Wales, Northern Ireland, and Scotland:

- Disclosure Policy and Procedure (England and Wales)
- Disclosure Policy and Procedure (Northern Ireland)
- Disclosure Policy and Procedure (Scotland)

Volunteers must not start in a role requiring a disclosure check until the process has been completed, and must not continue in a role requiring a disclosure if they have not renewed their check.

1.1. Your Coordinating Team

Your Coordinating Team is responsible for making sure that anyone who volunteers for your group completes a disclosure check before they start doing their role, if required.

Keeping us informed

Whenever you recruit a new volunteer, or an existing volunteer changes role, make sure you contact the Supporter Care Team to update our central volunteer database.

Find out more For more on how the Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

2. Who needs to be checked?

2.1. Group volunteers

If your volunteer role involves contact with adults with MS when they take part in certain activities, you must complete a disclosure check before taking up the role. Refer to the relevant policy for roles that need disclosure checks where you are.

Find out more For a list of who needs to be checked where you are, see Disclosure on our volunteer website, or ask your LNO for help.

2.2. Service providers

Individuals who provide services on behalf of your group (‘service providers’) may also need to be checked. This includes, but is not limited to, physiotherapists, counsellors and others who work with service users.

All disclosure checks must be completed before a service starts. Ask your service provider to contact our Disclosure Team at disclosure@mssociety.org.uk to request an application form, or to check existing certificates before they start delivering a service.

Disclosure checks are free of charge for volunteers, but service providers must pay for their disclosure check, in the same way that they pay for their own insurance and any professional registration they hold. Your Coordinating Team may decide to cover this fee.

3. The disclosure process

3.1. England and Wales

In England and Wales, disclosure checks are provided by the Disclosure and Barring Service (DBS).

- When your group recruits a volunteer or service provider in a role or activity that requires a disclosure check, contact our Disclosure Team at disclosure@mssociety.org.uk to request an application form, or to check an existing disclosure certificate.
- The applicant completes the application form and provides three identity documents from the list included in the application pack.
- A member of your Coordinating Team witnesses that the three identity documents confirm the applicant's identity.
- The applicant uses the pre-paid envelope provided to submit their application form and identity check form to our Disclosure Team. If they are a service provider, they must also enclose payment.
- We send your application form to the DBS who will process it.
- The DBS sends the disclosure certificate to the applicant and informs us.
- If a disclosure certificate is returned with a disclosure on it, the process is not finished until the applicant has sent in their certificate and we have completed any necessary risk assessment.
- We add disclosure details to the Portal and inform the applicant and your Group Coordinator that the disclosure check has been completed and the applicant is suitable to volunteer or provide services.
- If you have lived outside the UK for a significant period of time you may have to complete additional checks. Our Disclosure Team will provide the information you need if this is the case.

Update service for England and Wales

The DBS update service keeps your disclosure certificate current and lets you take it to other organisations. This is a free service for volunteers (service providers pay £13 a year). Our Disclosure Team will enrol you on request.

If you already have a disclosure certificate and you are registered with the update service, contact our Disclosure Team as you may be able to use it for your role with us.

We update certificates regularly, but to save time, you may wish to sign up to the update service.

Witnessing identity documents

In England and Wales, all members of your Coordinating Team can witness identity documents. This means checking that the applicant has provided the correct number and type of identity documents, and recording some of this information to confirm that you have done so.

You must not make or keep photocopies of an applicant's identity documents.

3.2. Northern Ireland

In Northern Ireland, disclosure checks are provided by Access NI.

- When your group recruits a volunteer or a service provider in a role or activity that requires a disclosure check, contact your Local Networks Officer (LNO) to request an application form.

- The applicant completes the application form and provides three identity documents from the list included in the application pack. If they are a service provider, they must also enclose payment.

- Your LNO checks the applicant's identity documents and forwards the completed application to the Day Centre Manager (DCM) at our Resource Centre, Belfast.

- Our DCM witnesses that the three identity documents confirm the applicant's identity and submits the application to Access NI.

- Access NI sends the disclosure certificate to the applicant and informs us.

- We add disclosure details to the Portal and inform the applicant and the Group Coordinator that the disclosure check has been completed and the applicant is suitable to volunteer or provide services.

3.3. Scotland

In Scotland, volunteer disclosure checks are provided by the Protecting Vulnerable Groups Scheme (PVG) and administered by Volunteer Scotland. Service providers must arrange and pay for their own disclosure checks.

- Your Coordinating Team agrees on a Nominated Lead Person to have the task of dealing with disclosure applications added to their role description.

- When your group recruits a volunteer in a role or activity that requires a disclosure check, your Nominated Lead Person contacts your Local Networks Officer (LNO) to request an application form.

- The volunteer completes the application form and provides three identity documents from the list included in the application pack.

- Your Nominated Lead Person checks the three identity documents confirm the applicant’s identity and submits the completed application to your LNO.

- Your LNO witnesses that the three identity documents confirm the applicant’s identity and submits the completed application to Volunteer Scotland for processing.

- Volunteer Scotland sends the disclosure certificate to the applicant and informs us.

- We add disclosure details to the Portal and inform the applicant and your Nominated Lead Person that the disclosure check has been completed and the applicant is suitable to volunteer.

Find out more

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

4. If an applicant has a criminal record

Having a criminal record does not automatically prevent anyone from volunteering with us.

If a disclosure certificate is returned with a record, a risk assessment will be carried out. As part of that process, our Head of Volunteering may contact the applicant to discuss the result.

5. Disclosure on the Portal

The ‘volunteers’ tab on the Portal is our record of all MS Society volunteers throughout the UK. This is where we track disclosure checks, from initial application through to receipt of certificate.

To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Progressing disclosure checks

Roles with access to personal data about our volunteers can use the Portal to check the progress of a disclosure application.

See A6: Handling data for your responsibilities when handling personal data.

Group Handbook C2: Disclosure checks v3.3	
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Editor:	Volunteer Resources Editor
Sign off:	Head of Local Networks
Sign off date:	October 2019
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C3: Your Coordinating Team

In this section

1. Organising your Coordinating Team

If your group handles money and delivers services and activities, you must have a Coordinating Team that meets regularly to review your finances, plan services and activities, and make decisions.

Your Coordinating Team shares responsibility for ensuring that the services and activities provided by your group reflect our 'charitable objects', and that all MS Society funds and assets under its control are used solely for this purpose.

See A4: Our legal identity, policies and rules for our charitable objects.

Your Coordinating Team must include a Group Coordinator, a Finance Volunteer and a minimum of one other volunteer.

You can invite other group volunteers to join your Coordinating Team as part of their role, but they are not required to do so.

Online Recruitment

Online Recruitment enables your group to manage the entire recruitment process online, from tailoring your advertisement and promoting your vacancy, to confirming a successful candidate in a role.

To request your Online Recruitment account, log in or get support, see Using Online Recruitment on our volunteer website, or ask the Volunteering Team for help.

1.1. Coordinating Team restrictions

Members of your Coordinating Team must all be aged 18 or over.

No more than two members of a family can join your Coordinating Team, and your Group Coordinator and Finance Volunteer must not be related. This is to ensure that your group’s finances and activities are coordinated independently.

Most volunteer roles can be shared, provided all the tasks are covered. However, your group must not split either the Group Coordinator or Finance Volunteer role between more than two people. This is to ensure the volunteers taking on these roles have adequate oversight of the tasks they share.

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

1.2. Named service teams

Your Coordinating Team may set up one or more named service teams to take responsibility for developing specific services and activities. For example, you may set up a 'seated exercise team'.

All named service teams are accountable to the Coordinating Team and a representative should attend team meetings regularly to report on, and review the service or activity they are responsible for.

2. Making decisions

2.1. Team meetings

Your Coordinating Team must hold a minimum of four team meetings per year to discuss matters that arise and make decisions on behalf of your group. You may choose to meet more frequently, or to use MS Society email to discuss matters between meetings.

Discussion between meetings

MS Society email enables your Coordinating Team to enjoy secure, GDPR compliant discussion between team meetings. You can circulate meeting agendas, share documents for comment, and make decisions.

Using MS Society email

If you hold one of these roles, we expect you to use MS Society email when you represent us:

- Group Coordinator
- Administration Volunteer
- Lead Support Volunteer
- Finance Volunteer
- Communications Volunteer
- Support Volunteer

Regardless of the volunteer role you hold, you must also use MS Society email whenever you represent us in these ways:

- Handling personal data by email
- Acting as an account signatory on your group’s cash pooling account
- Communicating with external organisations or people by email on our behalf

If you are a Coordinating Team member who doesn’t meet any of these criteria, you can still request an MS Society email address.

We will ask you to complete Data protection for GDPR eLearning before we set up your MS Society email account.

To request your individual MS Society email account, log in or get support, see Using MS Society email on our volunteer website, or ask the Supporter Care Team for help.

It is important that you involve all members of the Coordinating Team in key discussions and reach decisions by consensus. If you can't reach a consensus, the Group Coordinator should decide.

Any decision made by your Coordinating Team via MS Society email must be agreed by all Coordinating Team members (including those who have decided not to request an MS Society email account at this time). You must record this agreement in meeting notes before the decision can be actioned.

Individual volunteers do not have the authority to conduct business on behalf of your group unless they have the agreement of the Coordinating Team. This agreement must be recorded in meeting notes.

Decision making considerations

We expect your Coordinating Team to make decisions in line with our organisational values, policies, rules and group requirements.

See our rules for volunteers and volunteer-led groups, or ask your Local Networks Officer (LNO) for help:

- Appendix 3: MS Society rules for groups
- Appendix 4: MS Society financial rules for groups
- Appendix 5: Code of Fundraising Practice in summary

2.2. Reviewing your group's accounts

Ideally monthly and at least once a quarter, your Finance Volunteer must provide a report on group finances to enable them to be reviewed during team meetings.

Your Finance Volunteer should present a Receipts and Payments Report from Online Accounting along with any additional information your Coordinating Team will need to understand group finances. This should include details of money raised and costs incurred at each fundraising event. It should also cover any major differences between your group's actual income and expenditure, and those in your plans and budgets.

Here are some questions your Coordinating Team should consider when reviewing your group's accounts:

- Are we using the funds we hold to meet the needs of everyone affected by MS in the area?

- If donors could see the receipts and payments account, would they feel that the money they had given was being used effectively and wisely?

- Are we raising enough money to sustain the services and activities that we provide at the moment?

- Are we building up excess funds that should be used to meet the needs of people affected by MS?

- Could our group contribute to UK-wide services such as our research programme, the MS Helpline or our national grant funds?

Find out more

See B4: Managing your finances for more on your Coordinating Team's financial responsibilities.

2.3. Involving people affected by MS

We expect your Coordinating Team to involve people affected by MS in decision making and encourage them to play an active role in planning services and activities. Your group must make sure all planning and consultation opportunities are fully accessible to people affected by MS.

See B6: Planning and delivering quality services and activities for guidance on accessibility.

2.4. Employing staff

A small number of MS Society groups employ staff, but we do not recommend that your group does so. Employing staff involves taking on significant legal obligations and large amounts of additional administration.

Your group must not create new employment positions. We will only support you to recruit existing roles.

Paying for services

If your Coordinating Team plans to pay an individual or organisation to provide a service, you should have a written agreement that sets out the expectations of everyone involved.

We expect your group to use our Service Level Agreement (SLA) template to set this up.

See B6: Planning and delivering quality services and activities for our guidance on setting up an SLA.

An SLA must not be used to engage a person to carry out an administrative or organisational function for your group that is being fulfilled elsewhere by one or more recognised MS Society group volunteer roles.

See our full list of recognised Group Roles on the volunteer website.

3. Keeping records

3.1. Team meeting actions

We recommend that you circulate an agenda before your team meetings so that everyone is clear about what is to be discussed and can prepare for the meeting.

Sample team meeting agenda

- Actions taken and matters arising since the last meeting
- Discussion about services and activities provided by your group
- A review of the group's financial accounts and fundraising progress

Team meetings do not need formal minutes, but we recommend that you maintain and circulate a list of actions agreed so everyone is clear about what is expected of them before the next team meeting.

3.2. Online Accounting

If your group handles money, we expect you to use our Online Accounting system to report on your financial transactions.

All members of your Coordinating Team can have access to Online Accounting and can use it to produce a range of reports that can be exported in PDF or Excel format for review during or between team meetings.

To set up Online Accounting, log in or get support, see Using Online Accounting on our volunteer website, or ask the Finance Support Team for help.

4. Dealing with concerns

The decisions made by your Coordinating Team should be informed by our local priorities and the needs of your MS community.

We do not expect you to experience difficulties, but if an issue occurs, you must follow our process for dealing with problems.

See A3: Our values and how we deal with problems for our process and policies for dealing with concerns.

We have two additional policies to address concerns that may be raised about your decision making process.

4.1. Conflicts of interest

A ‘conflict of interest’ is any situation in which personal interests, or the loyalty you owe to another person or organisation, could influence, or appear to influence, a decision you are involved in making.
We all share a responsibility for declaring any conflicts of interest or potential conflicts of interest, and ensuring that we do not take part in discussions or decisions made on that subject.

Find out more See our Conflicts of Interest Policy on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

4.2. Accepting gifts and hospitality

These are our guidelines for accepting gifts or hospitality given or offered by a company, organisation or person:

- Small gifts from companies or people up to a value of £25 such as stationery, mugs, books, flowers and chocolate may be accepted, but they must be declared to your Coordinating Team to prevent a conflict of interest from arising.

- Cash, gift vouchers, paid holidays and use of company flats or facilities must be refused under all circumstances.

Contact your LNO if you are concerned about a conflict of interest, or for guidance on whether you should accept a gift or offer of hospitality.

Find out more See Appendix 2: Sources of support for staff contact details.

Group Handbook C3: Your Coordinating Team v3.3	
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C4: Membership administration

In this section

1. New members
2. Membership renewals
3. Membership data

MS Society membership is open to anyone who has an interest in our work, and currently costs a flat subscription fee of £5.00 per year.

Your group must not charge more than the agreed subscription, but you can invite additional voluntary contributions from members.

Access to MS Society services

We provide information, support and services for all people affected by MS. A person does not have to be an MS Society member to access our services or volunteer for one of our groups, nor does membership give any greater entitlement to our support.

1. New members

Members can join us in the following ways:

1.1. Online

New members can join us via the MS Society Website. They can choose to make a one-off payment, or set up a Direct Debit to renew their membership automatically in future.

1.2. By phone

Our Supporter Care Team is available to deal with membership application requests, and take payment of membership fees over the phone.

Find out more For more on how the Supporter Care Team can help you, see Supporter Care Team on our volunteer website.

1.3. By post

Our membership application form can be downloaded from the website and posted to us with payment, or printed copies can be requested from the Supporter Care Team.

1.4. Locally

New members may choose to join us through their local MS Society group. To ensure that you only submit up to date membership forms, we recommend that you keep stocks of printed forms to a minimum.

Find out more Download our Membership Form on the volunteer website, or ask the Supporter Care Team to send you printed copies as they are required.

When a person joins via your group, you must forward their membership form to MS National Centre. This will enable us to record the membership, the member’s preferred methods of communication and make it available to your group through the Portal.

Find out more To request your Portal account, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Membership fees on Online Accounting

Once a new member has been added, their fee will be allocated to your group and will be available to view via Online Accounting.

Find out more To set up Online Accounting, log in or get support, see Using Online Accounting on our volunteer website, or ask the Finance Support Team for help.

All new members who are in your catchment area will be automatically allocated to your group, unless they tell us otherwise.

2. Membership renewals

MS Society membership is annual, meaning that it needs to be renewed each year, at the end of the month a member joined.

If a member has set up a direct debit or standing order, their membership will be renewed automatically and they will not receive a renewal notice.

All other renewals are managed by the Supporter Care Team, which sends out reminders throughout the year. If a member tells us about any change in their details, we'll update their record.

If you become aware of a member's change of details, or the death of a member, you must tell the Supporter Care Team as soon as possible, to keep our member information up to date and accurate.

If a member renews via your group, you must contact the Supporter Care Team so that their membership record can be updated, and to ensure that no further renewal reminders are sent.

3. Membership data

3.1. Accessing membership data

If your group handles money and delivers services and activities, you need to be able to communicate with MS Society members within the area who have agreed for their details to be shared with you; a requirement for groups that do these things.

Find out more

See A6: Handling data for how to access membership data and your responsibilities when doing so.

3.2. Using membership data

You can use membership data to write to members, give them news about your group, and invite them to events and activities, by post and email.

Find out more

See B1: Availability, contact and communication for suggestions on topics to communicate with members about.

If a member does not appear on a list you download from the Portal, this is usually because they have told us they don't want to hear from your group, or because they have opted out of receiving marketing communications from us.

You must not contact these members for any reason.

Group Handbook C4: Membership administration v3.3	
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Part D: Optional additional services

D1: Offering MS Support

In this section

1. What is MS Support?
2. Offering emotional support
3. Giving information
4. Signposting to specialist advice
5. Help to access financial support
6. Informing our work
7. Setting up an MS Support service
8. Induction, training and ongoing support

If your group handles money and provides services and activities, you may decide to offer MS Support as an optional additional service.

We know that having access to MS Support delivered locally has a positive impact on people affected by MS, and we encourage our groups to provide this service.

MS Support volunteer roles

Your MS Support service must only be provided by volunteers in these roles, who have completed Support Volunteer Training and hold a current disclosure check:

- Lead Support Volunteer
- Support Volunteer

When we use the term Lead/Support Volunteers, we mean both roles.

See C1: Volunteering with us for guidance on recruiting, supporting and recognising your volunteers.

This section gives an overview of our MS Support priorities, our ways of working, and how we help our groups to offer a local MS Support service.

It is not intended to replace Support Volunteer Training, which all Lead/Support Volunteers must complete before offering one to one support.

Find out more See Supporting People on the volunteer website for our full range of MS Support guidance and resources.

1. What is MS Support?

With the right support and understanding, people with MS can live independent lives and take advantage of the same opportunities as everyone else.

MS Support is a key service delivered locally by our groups to help people affected by MS to access support when they want it, to make informed choices that meet their needs.

We want MS Support to be available to everyone who needs it, wherever they are in the UK. By offering an MS Support service, your group will help us meet this goal.

1.1. Our priorities

We have identified four priorities we want all local MS Support services to meet. Your MS Support service must meet these priorities:

- Offering emotional support
- Giving information
- Signposting to specialist advice
- Help to access financial support

1.2. Meeting our requirements

Our MS Support requirements are the same as those for other services and activities your group may provide. Throughout this section, you'll find information about our group requirements as they specifically apply to your MS Support service.

Find out more See A2: Requirements, support, tools and resources for an overview of our group requirements.

2. Offering emotional support

Emotional support means Lead/Support Volunteers offering a listening ear and empathy in response to feelings expressed by a person affected by MS.

Emotional support may happen:

- By phone
- By email
- At a group activity or social event
- Face to face at a pre-arranged meeting

2.1. Being easy to contact

Being easy to contact is a requirement for all groups that handle money and provide services and activities.

If your group offers MS Support, we expect you to do the following:

- Have agreed MS Support service contact details with a named volunteer responsible for monitoring each contact method.

- Have a named contact and contact details for the MS Support activities your group provides.

This will ensure that people who contact your group for MS Support are dealt with by a Lead/Support Volunteer trained to provide emotional support.

Phone

People expect to be able to contact your MS Support service by phone. We want you to agree set hours when a Lead/Support Volunteer will be available to take calls.

We recommend that your Coordinating Team purchases a dedicated landline or mobile phone for making and receiving MS Support calls on our behalf.

Email

Being easy to contact by email has become an important way to support people affected by MS.

If you offer MS Support, you must use your group's dedicated 'support@mssociety.org.uk' MS Society email address to send and receive emails on our behalf.

Find out more

See B1: Availability, contact and communication for our guidance on setting up a dedicated phone line and using MS Society email.

Keeping your personal information safe

We strongly recommend that you do not share your personal information – including home addresses, email addresses and phone numbers – anywhere in print, online, or in email communications.

This ensures your safety and security, both during and after your time volunteering with us. It also makes it easier to transfer responsibility for a contact method if someone is away, or steps down.

2.2. Supporting people to attend activities and events

We want people affected by MS to be able to live their lives, strengthened by a community that ensures no one has to face MS alone.

We are committed to equality, diversity and inclusion. We expect our groups to include all people affected by MS and not discriminate against anyone when providing services.

Access to MS Society services

We provide information, support and services for all people affected by MS. A person does not have to be an MS Society member to access our services, nor does membership give any greater entitlement to our support.

Our Lead/Support Volunteers encourage people to access group activities and social events. This could involve reassuring the person that a named volunteer will be there with them, the first time they come along.

Lead/Support Volunteers may also take responsibility for ensuring the activities and events your group provides address the needs of your local MS community.

Find out more

See A3: Our values and how we deal with problems for how we put our equality, diversity and inclusion policies into practice.

Organising an event

Organising an event is a great way to bring people together and offer support to your MS community.

For everything you need to plan, deliver and follow up an event, see Organising an event on our volunteer website.

Personal care

People with MS must be able to use our services and activities knowing that they will be treated with dignity and respect, and that they will have access to the personal care they need.

In most cases, personal care should be provided by a person’s own carer, who may be a family member or a paid carer.

However, if your group organises an activity that aims to give primary carers a break, you must supply contracted care assistants to provide personal care.

Find out more

Learn about your responsibilities under our Personal Care Policy on the volunteer website, or ask your Local Networks Officer (LNO) for help.

2.3. Face to face support

Your MS Support service may offer pre-arranged meetings for people affected by MS in public places, hospitals or residential care settings.

We don’t expect your MS Support service to offer regular ongoing visits, and you must not provide any of these services on our behalf:

- Shopping
- Gardening
- Meal preparation
- Personal care
- Replacement care
- Companionship/friendship

Home visits

You may be asked to make home visits for people that are isolated. If home visiting is the only possible way to meet with someone, you must ensure that at least two people visit together.

See A5: Health, safety and wellbeing for our Lone Volunteering Policy and guidance.

2.4. Emotional support - boundaries

We provide training and ongoing support to enable your group to offer an MS Support service that is safe, accessible and impactful. This includes understanding and holding the boundaries we have in place to protect everyone.

We don’t expect your MS Support service to provide the following types of emotional support, and you must not do so on our behalf:

- Counselling
- Befriending
- Complex problem solving
- Dealing with safeguarding concerns
- High end emotional support for strong feelings of anger, sadness, happiness, worry, anxiety, depression and suicidal ideation

MS Helpline

We recognise that Lead/Support Volunteers may experience emotional situations that go beyond the boundaries of MS Support. When this happens, we want you to signpost the person to an appropriate specialist service, such as our MS Helpline, The Samaritans or local counselling.

Our MS Helpline offers emotional support, information and benefits advice to anyone affected by MS in the UK. You can ask them for help with individual enquiries and share the MS Helpline contact details with anyone you think could benefit.

MS Helpline
helpline@mssociety.org.uk
Freephone: 0808 800 8000

2.5. Safeguarding

Safeguarding means making sure that people at risk in contact with the MS Society are protected from abuse. Although encountering abuse is rare, it is important that it is never ignored.

See A5: Health, safety and wellbeing for our Safeguarding Policy and guidance.

You may become aware of abuse if you:

- Witness a form of abuse
- Suspect someone is being abused
- Are told about abuse by a person with MS or someone they know

Reporting safeguarding concerns

We don't expect your MS Support service to deal with safeguarding concerns and you must not do so on our behalf.

If you become aware of abuse, or suspected abuse, report your concerns to the Safeguarding Responders Group by email as soon as possible, or by calling your MS Society national office.

Safeguarding Responders Group
safeguarding@mssociety.org.uk
Tel: Via your national office

Find out more

See Appendix 2: Sources of support for national office contact details.

3. Giving information

We offer information to support and enable people to take control and make choices for themselves. This means that it is up to the person to decide what works best for them, based on the information available, or knowing where to go to find out more.

If your group handles money and provides services and activities, we expect you to ensure that information about MS and MS Society services and activities is available to everyone in your community.

Find out more

See B3: Giving information for support to meet this requirement.

Lead/Support Volunteers receive training and ongoing support to enhance your group's information giving. This enables your MS Support service to:

- Ask the right questions to understand what people want to know, or need support with.

- Have expert knowledge of our resources, and support people to access those that are relevant to their situation.

- Receive all new and revised MS Society publications as they are released.
- Give relevant and up to date information.
- Know where people can get information and support locally about other specialist services.
- Help people pull everything together to make informed choices that meet their needs, in ways that suit them.
- Keep us informed about the types of enquiries your group receives to help us improve services and resources.

3.1. Handling data

We are all responsible for protecting the privacy of individuals and their right to control the ways we use their personal information. Our obligations apply to personal data held in any form, both electronic and on paper.

Find out more

See A6: Handling data for our rules when dealing with personal information.

We don't expect Lead/Support Volunteers to hold personal information about people using your MS Support service, or make case notes about enquiries you have taken, and you must not do so.

Using the Portal

As a Lead Support Volunteer or Support Volunteer, you can use our Portal to access to contact information about members who have agreed to be contacted by us.

We will ask you to complete Data Protection for GDPR eLearning before you use the Portal for the first time.

Find out more

To request access to the Portal, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

When you do handle personal information, we expect you to be discreet at all times, and maintain confidentiality where necessary. You must ask permission from a person before sharing information about them with another Lead/Support Volunteer. You must only use the information they share for the purpose/s they have agreed to.

If you are concerned that your MS Support service or an individual volunteer may have breached our data requirements, you must contact our Data Governance Team immediately for advice.

Safeguarding, emergencies and data protection

You must report all abuse or suspected abuse to the Safeguarding Responders Group, even if you have not been able to obtain permission.

If someone's life is in immediate danger, data protection laws do not prevent you from acting immediately to share information with the emergency services, health professionals or other authorities.

However, if your group is approached by the Police or any other authority asking for information about a person in anything other than a life or death situation, you must always refer them to our Data Governance Team.

Data Governance Team
datagovernance@mssociety.org.uk
Tel: 0203 872 8735

Find out more

See our Safeguarding Policy and guidance on the volunteer website, or contact the Safeguarding Responders Group for help.

4. Signposting to specialist advice

We define specialist advice as, "a person or organisation regarded as knowledgeable or authoritative making recommendations concerning future action."

Specialist advice includes these activities:

- Benefits advice
- Other financial advice
- Advice on how to apply for health and social care services
- Care navigation or case work
- Recommending services such as clinical or therapeutic services that are not regulated

We don't expect your MS Support service to offer specialist advice and you must not do so on our behalf. If a person needs specialist advice, we want you to signpost to a suitable service provider, or contact our MS Helpline for support.

4.1. Signposting resources

We want all groups that handle money and deliver services and activities to maintain a list of local MS services to signpost to when dealing with information enquiries. We've developed a Local Contacts Template to help you do this.

If your group offers MS Support, your Lead/Support Volunteers also have access to the list of UK-wide and nation-specific organisations that our MS Helpline signposts to.

For our Local Contacts Template and MS Helpline Signposting List, see Signposting To Specialist Advice on the volunteer website, or ask your Local Networks Officer for help.

Our signposting criteria

Trustworthy
Is their advice objective and information based?

Accurate
Are they evidence based and specialists in their field?

Up to date
Are review dates available on their website?

Relevant
Do they offer what is needed?

Professional
Is their information accessible and easy to use?

4.2. Organisations we signpost to

We only signpost to organisations that meet our signposting criteria:

- The NHS, including NHS Choices and the National Institute for Health and Care Excellence (NICE)
- Government agencies and departments, such as the Department of Work and Pensions (DWP)
- Governing bodies, such as the British Medical Association (BMA)

- Legislative bodies, including UK Parliament, Scottish Parliament, Northern Ireland Assembly and Welsh Assembly
- National charities and other not-for-profit organisations like us, and trade unions
- Well known, authoritative organisations seen as a trusted source of information and guidance, such as the BBC

4.3. Advice partnerships

Some groups develop a partnership with a local organisation that provides specialist advice to meet local need.

An ‘advice partnership’ usually involves an MS Society group funding a qualified Citizens Advice Bureau worker (or similar) to provide specialist advice for an agreed number of hours or days per week or month. This enables people affected by MS to access the support they need quickly and at a location that is accessible to them.

Your group may decide to develop an advice partnership instead of, or as well as offering MS Support. This decision should always be based on what is needed locally and your available resources.

5. Help to access financial support

People with MS may have additional needs as a result of their MS, and may need financial support to meet them. We help people to access this support in a number of ways.

5.1. Information about MS Society grants

We provide financial grants to people affected by MS for things they feel will make a positive impact on their lives.

If your group handles money and provides services and activities, we expect you to ensure that information about our national grants programme is available to all people affected by MS within your community.

See National Grant Funds on our volunteer website, or ask the Supporter Care Team for help.

5.2. Support to fill in grant application forms

People may ask for help to fill in MS Society grant application forms. Only Lead/Support Volunteers who have completed Support Volunteer Training can offer this level of support.

Our Supporter Care Team is available to help grant applicants in areas where we don't offer a local MS Support service.

Handling grant application paperwork

Grant application forms must be kept in a locked drawer, filing cabinet or cupboard at all times when they are not being used. Access to the key or combination lock must be limited only to volunteers in roles that are allowed to use MS Society personal data. You must not allow members of your family to access personal data you hold.

Find out more

See A6: Handling data for our personal data storage rules.

Awarding grants

Your group may decide to award MS Society grants locally as an optional additional service. You may set up a local grants service instead of, or as well as offering MS Support. This decision should always be based on what is needed locally and your team's capacity.

Lead/Support Volunteers who have supported a person to complete an MS Society grant application form must not be involved in the decision about whether to award it.

Find out more

See A2: Requirements, support, tools and resources for an overview of optional additional services your group may decide to offer.

5.3. Accessing wider financial support

Groups that offer MS Support help people affected by MS to access information and services to enable them to make decisions about wider financial matters.

We provide Lead/Support Volunteers with training and ongoing support that enables your MS Support service to:

- Ask the right questions to help people affected by MS to establish whether financial support will meet their needs.
- Know where people can get local information and support from specialist financial services.
- Support people to apply for financial support from local and national grant making organisations.

5.4. Financial support - boundaries

We don't expect your MS Support service to provide the following types of financial support, and you must not do so on our behalf:

- Completing benefits or health and social care assessment forms on a person's behalf.
- Giving advice about what to include on benefits or health and social care assessment forms.
- Making decisions about an MS Society grant application you have helped with.

6. Informing our work

Keeping us informed of your activities is a requirement for all MS Society groups.

We expect your Coordinating Team to do this in two ways:

- Have regular contact with your Local Networks Officer
- If your group handles money and delivers services and activities, use the Portal to maintain a record of what you provide

Find out more

See A7: Keeping in touch for the ways we support your group to do this.

MS Support on the Portal

The Portal is our record of all services and activities delivered by MS Society groups. If your group offers MS Support, we want you to record it on the Portal under the 'services and activities' tab.

We will use this information to promote your services on our website and confirm that the appropriate level of risk management has been completed.

To request access to the Portal, log in or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

6.1. Telling us about your MS Support service

Keeping us informed about your MS Support service is another way to help us understand our impact on the lives of people affected by MS.

We want all Lead/Support Volunteers to use our MS Support monthly enquiry tally sheet to record:

- How many queries you take in a month
- How many hours you spend delivering MS Support in a month
- How many new contacts you make in a month
- What your three key queries have been in the month

Each month, we will send a link to a short online survey to all Lead/Support Volunteers to ask for your group's totals. We will never ask you to share personal information about the people you support.

Download our MS Support Monthly Enquiry Tally Sheet on the volunteer website, or ask the Supporter Care Team to send you a printed copy.

7. Setting up an MS Support service

7.1. Understanding local need

Before your group decides which MS Support activities to deliver, we want you to find out what is needed locally. Local staff, our members, MS professionals and your wider MS community can help you understand local need.

See B6: Planning and delivering quality services and activities for guidance on how to identify local need.

7.2. Planning your MS Support service

Once you understand what MS Support is needed locally, we want your Coordinating Team to consider these questions:

- How will the activities we want to offer meet the four MS Support priorities?
- How do we plan to cover the costs of offering MS Support?
- What methods will we use to promote our MS Support service?
- Do we have trained Lead/Support Volunteers in place to provide an MS Support service?

Find out more

See C3: Your Coordinating Team for guidance on how your group should operate.

7.3. Our MS Support volunteer roles

Support Volunteer

To offer an MS Support service, you must have a minimum of one Support Volunteer who has completed Support Volunteer Training and holds a current disclosure check.

This enables your group to offer:

- Emotional support
- Enhanced information giving
- Signposting to specialist advice
- Help to complete grant applications and access financial support

Find out more

See our Support Volunteer role page on the volunteer website, or ask your LNO for help.

Team benefits

Offering MS Support through a team of Support Volunteers may make it easier to provide a quality service.

This enables your group to:

- Share enquiries and tasks between a number of volunteers
- Divide your MS Support service geographically

- Operate a rota and increase your availability
- Utilise specialist skills an individual may have
- Organise peer support within your team
- Cover when volunteers are unavailable or need to take a break

Lead Support Volunteer

If your group decides to set up an MS Support team, we recommend that you appoint a Lead Support Volunteer to coordinate your MS Support activities. They take additional responsibility for:

- Assisting your Group Coordinator to recruit Support Volunteers
- Coordinating and supporting your Support Volunteers
- Delegating tasks within the team
- Planning rotas
- Reporting on your MS Support service at Coordinating Team meetings

Find out more

See our Lead Support Volunteer role page on the volunteer website, or ask your LNO for help.

7.4. Recruiting Support Volunteers

Your Group Coordinator has overall responsibility for recruiting, selecting and inducting group volunteers. However, they may choose to share this task with others.

If your group offers an MS Support service, you may have a Lead Support Volunteer who coordinates Support Volunteer recruitment.

Recruitment resources

We recruit all group roles with our agreed recruitment process, using Online Recruitment or our paper Volunteer Application Form, and our role descriptions and recruitment guidance.

We make our selection based on whether a role meets an applicant’s aspirations, is within their capabilities, and suits the time they want to give us.

Find out more

For our role descriptions and recruitment guidance, see Volunteering With Us on the volunteer website, or ask the Supporter Care Team for help.

Online Recruitment

Online Recruitment enables your group to manage the entire recruitment process online, from tailoring your advertisement and promoting your vacancy, to confirming a successful candidate in a role.

To request your Online Recruitment account, log in or get support, see Using Online Recruitment on our volunteer website, or ask the Volunteering Team for help.

Support Volunteer tasks

Each of our volunteer role descriptions includes a list of tasks. To offer an MS Support service, all the tasks listed on our Support Volunteer role description must be covered, by one or more Support Volunteers.

Your Group Coordinator (or Lead Support Volunteer) is responsible for ensuring that all MS Support tasks are covered by someone, and that each Support Volunteer's wellbeing is considered before they take on additional responsibilities.

All volunteers that carry out Support Volunteer tasks must complete Support Volunteer Training and hold a current disclosure check.

7.5. Disclosure checks

As part of our wider commitment to safeguarding, people in particular volunteer roles at the MS Society are required to have a disclosure check as part of their recruitment process.

All potential Lead/Support Volunteers must complete a disclosure check before being allowed to offer any new or existing MS Support activity.

Keeping us informed

Whenever you recruit a new Lead/Support Volunteer, or an existing volunteer changes role, you must contact our Supporter Care Team to update our central volunteer database and commence the disclosure process.

Find out more See C2: Disclosure checks for your Coordinating Team's responsibilities and our nation-specific disclosure processes.

8. Induction, 'must do' training and ongoing support

We need to ensure our groups are able to offer MS Support services that are safe, accessible and impactful.

We do this by providing Lead/Support Volunteers with:

- A thorough induction programme
- 'Must do' Support Volunteer Training
- Ongoing face to face, phone and email support

8.1. Induction

We want all volunteers who are new to a role to know what to do and who can help, right from the start. During your induction, we will help you find about what we do and what volunteering with us is like.

Welcome Booklet

Our Welcome Booklet is for all volunteers newly joining us. It includes information about:

- Who we are and how we work
- Our commitments to you and our expectations
- Our approach to learning and development

Welcome and Induction Checklists

We provide all volunteers who are new to a role with a role specific Welcome and Induction Checklist to help you settle in.

Our Support Volunteer Welcome and Induction Checklist includes an online presentation to introduce you to your role, and links to key resources that will support you.

Our Lead Support Volunteer Welcome and Induction Checklist expands on the Support Volunteer checklist, and includes guidance on the additional responsibilities of this coordinating role.

We expect your Group Coordinator or existing Lead Support Volunteer to meet with new Lead/Support Volunteers to talk through the Welcome and Induction Checklist.

For our Welcome Booklet and links to all Welcome and Induction Checklists, see Welcome to the MS Society on the volunteer website or ask the Supporter Care Team for help.

8.2. Support Volunteer Training

During induction, we expect all Lead/Support Volunteers to complete our 'must do' Support Volunteer Training that consists of four modules:

1. Choice and control

- Barriers people affected by MS may face
- The importance of having choice and control
- Skills, qualities and good practice when offering MS Support

2. Emotional support

- Principles and boundaries of offering emotional support
- Common responses and questions about MS
- The impact of diagnosis on everyone it affects

3. Information matters

- Confidentiality and safeguarding awareness
- Providing appropriate and quality information
- Signposting to local and national specialist advice services

4. Money matters

- Financial issues people affected by MS may face
- Access to money, work and benefits information and support services
- Supporting people to apply for MS Society and external grants

For online and face-to-face MS Support Training dates, see Events on the volunteer website or ask the Supporter Care Team for help.

New and existing MS Support services

If your group sets up a *new* MS Support service, you must ensure that all Lead/Support Volunteers complete Support Volunteer Training before starting.

New Lead/Support Volunteers joining an *existing* MS Support service can assist current Lead/Support Volunteers to provide activities, but must not offer one to one support until Support Volunteer Training is completed.

8.3. Ongoing support

If your group offers an MS Support service, you have access to a range of ongoing support, including:

- Practical support to organise your service
- Peer support to develop your network of contacts
- Emotional support to manage the effects of helping others
- Signposting support to access specialist advice
- Regular updates to keep your knowledge current

Your Local Networks Officer

Your LNO works with groups to develop quality services and activities for people affected by MS. Your LNO has regular contact with your Coordinating Team, and quarterly face to face meetings with your Group Coordinator and/or Finance Volunteer.

We want you to involve your LNO in planning your MS Support service, reviewing your progress, and dealing with any concerns.

For contact details for your LNO, see Local Networks Team on our volunteer website, or ask the Supporter Care Team for help.

Support and Wellbeing Team

Our Support and Wellbeing Team is here to offer telephone and email support to volunteers whose role may involve dealing with difficult or distressing situations.

If you are a Group Coordinator, Lead Support Volunteer or Support Volunteer, we will invite you to join our regular telephone sessions to talk confidentially about your role, raise any concerns, and share experiences with others who offer a similar service.

Support and Wellbeing Team
supportwellbeing@mssociety.org.uk
Tel: 0300 500 8084

For more information, see Support and Wellbeing Team on the volunteer website or ask the Supporter Care Team for help.

MS Support forums

We organise dedicated MS Support forums throughout the UK for Lead/ Support Volunteers to come together, share ideas and support each other.

We also use forums to share updates and consult you on MS Support matters to inform our future work.

Look out for an invitation from your LNO, or see Volunteer Events on our volunteer website to book your place at our next round of MS Support forums.

MS Helpline

Our MS Helpline offers emotional support, information and benefits advice to anyone affected by MS in the UK.

The MS Helpline maintains a list of external specialist organisations we signpost to, locally, nationally and throughout the UK. Your group can ask them for help with individual enquiries, and share the MS Helpline contact details with anyone you think could benefit.

Our MS Helpline is also available to all volunteers for emotional support to manage the effects of helping others on your own wellbeing.

- Freephone helpline: 0808 800 8000
- Helpline email service: helpline@mssociety.org.uk

Group Handbook D1: Offering MS Support v3.3	
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Sign off:	Head of Local Networks
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Appendices

Appendix 1: Volunteer website resource index

This index includes all volunteer website resources referred to in the Group Handbook, sorted alphabetically. Click on any resource in the index to be taken to the web page or downloadable resource, or click on the link in the reference column to go to the handbook section where we recommend it.

Resource	Reference
A-Z: Our volunteer roles	C1: Volunteering with us
Access audit form	B1: Availability, contact and communication
Accident report form	A5: Health, safety and wellbeing
Activities Organiser	A5: Health, safety and wellbeing A6: Handling data B3: Giving information B6: Planning and delivering quality services and activities C1: Volunteering with us
Activities Volunteer	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
Administration Volunteer	A5: Health, safety and wellbeing A6: Handling data B1: Availability, contact and communication B3: Giving information C1: Volunteering with us C3: Your Coordinating Team
Applying to a local trust	B5: Fundraising
Being easy to contact by phone	B1: Availability, contact and communication
Brand guidelines	B2: Using our brand
Claiming expenses	C1: Volunteering with us

Resource	Reference
Code of conduct	A3: Our values and how we deal with problems C1: Volunteering with us
Comments, compliments and complaints policy	A3: Our values and how we deal with problems
Communications Volunteer	A6: Handling data B1: Availability, contact and communication B3: Giving information C1: Volunteering with us C3: Your Coordinating Team
Conflicts of interest policy	B4: Managing your finances C3: Your Coordinating Team
Consent form	A6: Handling data B1: Availability, contact and communication
Data protection policy	A6: Handling data
Delivering quality services	B6: Planning and delivering quality services and activities
Dignity at work and when volunteering policy	A3: Our values and how we deal with problems
Disclaimer	A5: Health, safety and wellbeing B1: Availability, contact and communication B3: Giving information
Disclosure checks	C2: Disclosure checks
Effective fundraising	B4: Managing your finances B5: Fundraising
Employer’s liability insurance certificate	A5: Health, safety and wellbeing
Equal opportunities and inclusion policy	A3: Our values and how we deal with problems

Resource	Reference
Event Volunteer	A5: Health, safety and wellbeing A6: Handling data B5: Fundraising C1: Volunteering with us
Finance Team	B4: Managing your finances
Finance Volunteer	A2: Requirements, support, tools and resources A6: Handling data A7: Keeping in touch B1: Availability, contact and communication B4: Managing your finances C1: Volunteering with us C3: Your Coordinating Team D1: Offering MS Support
Fundraising complaints form	B5: Fundraising
Fundraising Events Volunteer	A5: Health, safety and wellbeing A6: Handling data B5: Fundraising C1: Volunteering with us
Fundraising support	B5: Fundraising
Fundraising Volunteer	A5: Health, safety and wellbeing A6: Handling data B5: Fundraising C1: Volunteering with us
Gift Aid declaration confirmation letter	B4: Managing your finances
Gift Aid declaration form	B4: Managing your finances
Governance of MS Society volunteer-led groups	A4: Our legal identity, policies and rules B4: Managing your finances
Group Coordinator	A2: Requirements, support, tools and resources A5: Health, safety and wellbeing A6: Handling data A7: Keeping in touch

Resource	Reference
	B4: Managing your finances C1: Volunteering with us C3: Your Coordinating Team D1: Offering MS Support
Group roles	B6: Planning and delivering quality services and activities C3: Your Coordinating Team
Health and safety policy	A5: Health, safety and wellbeing
Health and Safety Volunteer	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
How to nominate a Shining Star	C1: Volunteering with us
Incident report form	A5: Health, safety and wellbeing
Information Events Volunteer	A5: Health, safety and wellbeing A6: Handling data B3: Giving information C1: Volunteering with us
Insurance documents	A5: Health, safety and wellbeing
IT support	A6: Handling data
Key publications list	B3: Giving information
Lead Support Volunteer	A2: Requirements, support, tools and resources A5: Health, safety and wellbeing A6: Handling data A7: Keeping in touch B1: Availability, contact and communication B3: Giving information C1: Volunteering with us C3: Your Coordinating Team D1: Offering MS Support
Letterhead template	A4: Our legal identity, policies and rules B4: Managing your finances

Resource	Reference
Local campaigning toolkit	B6: Planning and delivering quality services and activities
Local contacts template	B3: Giving information D1: Offering MS Support
Local Networks Team	A2: Requirements, support, tools and resources A3: Our values and how we deal with problems A6: Handling data A7: Keeping in touch B1: Availability, contact and communication B3: Giving information B4: Managing your finances B6: Planning and delivering quality services and activities C1: Volunteering with us C2: Disclosure checks C3: Your Coordinating Team D1: Offering MS Support
Logo	B2: Using our brand B5: Fundraising
Lone volunteering policy	A5: Health, safety and wellbeing D1: Offering MS Support
Managing your finances	B4: Managing your finances
Membership form	C4: Membership administration
MS Society email	A2: Requirements, support, tools and resources A6: Handling data B1: Availability, contact and communication B2: Using our brand B4: Managing your finances C1: Volunteering with us C3: Your Coordinating Team
MS Support monthly enquiry tally sheet	A7: Keeping in touch D1: Offering MS Support

Resource	Reference
National grant funds	A5: Health, safety and wellbeing B3: Giving information D1: Offering MS Support
Online Accounting	A2: Requirements, support, tools and resources B4: Managing your finances C3: Your Coordinating Team C4: Membership administration
Online Recruitment	A2: Requirements, support, tools and resources C1: Volunteering with us C3: Your Coordinating Team D1: Offering MS Support
Online Shop	A2: Requirements, support, tools and resources B2: Using our brand B3: Giving information B5: Fundraising C1: Volunteering with us
Organising an event	B3: Giving information
Organising your team	C1: Volunteering with us
Our people	A1: Introduction and overview
Our volunteer roles	C1: Volunteering with us
Passenger Assistant	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
Personal care policy	A3: Our values and how we deal with problems A5: Health, safety and wellbeing B6: Planning and delivering quality services and activities D1: Offering MS Support
Physical activity readiness questionnaire (PARQ)	A6: Handling data

Resource	Reference
Policies and documents	A4: Our legal identity, policies and rules
Portal	A2: Requirements, support, tools and resources A5: Health, safety and wellbeing A6: Handling data A7: Keeping in touch B1: Availability, contact and communication B4: Managing your finances B6: Planning and delivering quality services and activities C1: Volunteering with us C2: Disclosure checks D1: Offering MS Support
Press and publicity advice	B1: Availability, contact and communication
Privacy notice	A6: Handling data
Privacy statements	A6: Handling data
Property Volunteer	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
Providing a volunteer reference	C1: Volunteering with us
Providing quality services and activities	B6: Planning and delivering quality services and activities
Public liability insurance certificate	A5: Health, safety and wellbeing
Recognising volunteer contributions	C1: Volunteering with us
Regional/External Relations Officers	B6: Planning and delivering quality services and activities
Representing the MS Society	B1: Availability, contact and communication
Resolving volunteer issues	A3: Our values and how we deal with problems

Resource	Reference
Risk management system	A5: Health, safety and wellbeing
Safeguarding policy	A3: Our values and how we deal with problems A5: Health, safety and wellbeing A6: Handling data D1: Offering MS Support
Safeguarding risk guidance	A5: Health, safety and wellbeing B6: Planning and delivering quality services and activities
Section 19 permit	A5: Health, safety and wellbeing
Service level agreements	A6: Handling data B6: Planning and delivering quality services and activities
Shop Volunteer	A5: Health, safety and wellbeing A6: Handling data B5: Fundraising C1: Volunteering with us
Signatory declaration form	B4: Managing your finances
Signposting to specialist advice	B3: Giving information D1: Offering MS Support
Sponsor form	B4: Managing your finances B5: Fundraising
Summary of insurance cover	A5: Health, safety and wellbeing
Support and Wellbeing Team	A2: Requirements, support, tools and resources D1: Offering MS Support
Support Volunteer	A2: Requirements, support, tools and resources A5: Health, safety and wellbeing A6: Handling data A7: Keeping in touch B1: Availability, contact and communication B3: Giving information C1: Volunteering with us

Resource	Reference
	C3: Your Coordinating Team D1: Offering MS Support
Supporter Care Team	A1: Introduction and overview A2: Requirements, support, tools and resources B1: Availability, contact and communication B4: Managing your finances B5: Fundraising C1: Volunteering with us C2: Disclosure checks C4: Membership administration
Supporter promise	B5: Fundraising
Supporting our volunteers	C1: Volunteering with us
Supporting people	D1: Offering MS Support
Teamspirit	A1: Introduction and overview C1: Volunteering with us
Third party data protection undertaking	A6: Handling data
Transport Volunteer	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
Using our brand	B2: Using our brand
Using social media	B1: Availability, contact and communication B2: Using our brand
Volunteer application form	C1: Volunteering with us
Volunteer Driver	A5: Health, safety and wellbeing A6: Handling data C1: Volunteering with us
Volunteer events	C1: Volunteering with us D1: Offering MS Support

Resource	Reference
Volunteer involvement policy	A3: Our values and how we deal with problems C1: Volunteering with us
Volunteer reference letter template	C1: Volunteering with us
Volunteering with us	C1: Volunteering with us D1: Offering MS Support
Web to Print	A2: Requirements, support, tools and resources A5: Health, safety and wellbeing B1: Availability, contact and communication B2: Using our brand B3: Giving information B4: Managing your finances C1: Volunteering with us
Welcome to the MS Society	C1: Volunteering with us D1: Offering MS Support
Whistleblowing policy	A3: Our values and how we deal with problems B4: Managing your finances

Group Handbook X1: Volunteer website resource index v3.3	
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Appendix 2: Sources of support

1. Supporter Care Team

Our Supporter Care Team is your point of contact for enquiries about most MS Society departments.

Supporter Care Team

supportercare@mssociety.org.uk
Tel: 0300 500 8084

2. Local staff support

Click on the link, or ask our Supporter Care Team for individual staff contact details.

Local Networks Officers

Local Networks Officers (LNOs) work with our Coordinating Teams to help extend our reach, increase understanding of MS locally, and offer quality services and activities for people affected by MS.

Fundraising support

Area Fundraisers and National Fundraising Managers work with our local groups and community volunteers to develop fundraising projects to increase our income. They focus on innovative activities and those that need specialised support.

Regional/External Relations Officers

Regional/External Relations Officers (R/EROs) build relationships with decision makers and professionals to ensure effective treatment and care exists for people affected by MS. Contact your R/ERO to find out about any local issues they have identified.

3. Governance

Board of Trustees

governance@mssociety.org.uk
Tel: 0300 500 8084

Volunteering Team

volunteering@mssociety.org.uk
Tel: 0300 500 8084

Data Governance Team

datagovernance@mssociety.org.uk
Tel: 0203 872 8735

4. Finance support

Our Finance Team is here to support your group to raise, spend, hold and account for funds and assets under your control, in line with our policies and rules, and external legislation.

Finance Support Team
financesupport@mssociety.org.uk
Tel: 0208 438 0711

Legacy Team
legacies@mssociety.org.uk
Tel: 0208 438 0763

Treasury Officer
treasury.support@mssociety.org.uk
Tel: 0203 828 6863

5. Health, safety and wellbeing

Disclosure Team
disclosure@mssociety.org.uk
Tel: 0203 828 6861

Facilities Team
fmsupportdesk@mssociety.org.uk
Tel: 0300 500 8084

Grants Team
grants@mssociety.org.uk
Tel: 0300 500 8084

Health and Safety Team
healthandsafety@mssociety.org.uk
Tel: 0208 827 0324

Quality and Safeguarding Manager
quality@mssociety.org.uk
Tel: 0208 438 0895

Safeguarding Responders Group
safeguarding@mssociety.org.uk
Tel: Via your national office

Support and Wellbeing Team
supportwellbeing@mssociety.org.uk
Tel: 0300 500 8084

MS Helpline

Our MS Helpline offers emotional support, information and benefits advice to anyone affected by MS in the UK and Northern Ireland. You can ask them for help with individual enquiries and share the MS Helpline contact details with anyone you think could benefit.

MS Helpline
helpline@mssociety.org.uk
Freephone: 0808 800 8000

6. Representing us

Brand Centre
brand@mssociety.org.uk
Tel: 0300 500 8084

Press Office
pressoffice@mssociety.org.uk
Tel: 0300 500 8084

Digital and Content Team
webteam@mssociety.org.uk
Tel: 0300 500 8084

Research Team
research@mssociety.org.uk
Tel: 0300 500 8084

7. UK and national MS Society offices

MS National Centre
372 Edgware Road, London, NW2 6ND
supportercare@mssociety.org.uk
Tel: 020 8438 0700

MS Society Cymru
Temple Court, Cathedral Road, Cardiff, CF11 9HA
mscymru@mssociety.org.uk
Tel: 029 2078 6676

MS Society Northern Ireland
The Resource Centre, 34 Annadale Avenue, Belfast, BT7 3JJ
nireception@mssociety.org.uk
Tel: 028 9080 2802

MS Society Scotland
Ratho Park, 88 Glasgow Road, Ratho Station, Newbridge, EH28 8PP
enquiries@mssocietyscotland.org.uk
Tel: 0131 335 4050

8. External contacts

Arthur J Gallagher Insurance
Temple Point, 7th Floor, 1 Temple Row, Birmingham, B2 5YB
Tel: 0121 200 4935

Barclays Client Executive Team
Tel: 0800 285 1040

IT Lab
Tel: Tel: 0207 030 3999
(for reporting lost or stolen mobile devices containing MS Society data only)

Group Handbook X2: Sources of support v3.3	
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Appendix 3: MS Society rules for groups

The Group Handbook sets out the rules for running an MS Society group. When we use the words 'must' or 'we expect you to', we mean specific rules that you must comply with.

This appendix lists all rules in the Group Handbook. It is intended as a quick reference guide – but not a replacement for following the guidance in the handbook as a whole.

If you are not meeting particular rules in this document, ask your Local Networks Officer (LNO) for support.

Part A: Group basics

A1: Introduction and overview

1. The Group Handbook sets out the principles and procedures that must be followed by MS Society groups across the UK – to make sure we act as one organisation in working towards our goals.

A2: Requirements, support, tools and resources

2. All groups must meet our basic requirements, and if your group handles money and provides services and activities for people affected by MS, there are additional requirements we expect to be met.

3. All MS Society groups must:

    - Respect our values, and ensure that all volunteers follow our Code of Conduct

    - Follow our policies and rules, ensure that everything you do is safe, and manage personal data appropriately

    - Keep us informed of your activities

4. MS Society groups that handle money and provide services and activities must:

    - Be available to all people affected by MS in the area, be easy to contact, regularly communicate with members, and ensure information about MS and MS Society services and activities is available to everyone in your community

- Manage your finances appropriately

- Have volunteers responsible for planning and delivering activities, and managing finances

- As a minimum, raise enough funds to cover the cost of your activities

- All services and activities you provide must:
    - align with our strategy and meet the needs of people affected by MS
    - be available to the whole MS community you serve
    - be safe and high quality

A3: Our values and how we deal with problems

5. Everybody who volunteers for, or is employed by the MS Society must take personal responsibility for following our Code of Conduct, as must all those connected with, or acting on our behalf.

6. We all share responsibility for following our Equal Opportunities and Inclusion Policy. This means that we all must:

    - Value and respect one another
    - Ensure nobody is harassed, bullied or victimised
    - Report unfair or offensive treatment
    - Seek to include all people affected by MS and not discriminate against anyone when providing services

7. All volunteer involvement is at our sole discretion and we reserve the right to remove an individual from their volunteering relationship with us, for whatever reason.

8. We expect your group to involve people affected by MS in decision making and encourage them to play an active role in planning services and activities.

9. You must make sure all planning and consultation opportunities are accessible to people affected by MS.

10. If a complaint or concern needs to be dealt with formally, you must follow the appropriate policy and procedure:

- Comments, Compliments and Complaints
- Dignity at Work and When Volunteering
- Resolving Volunteer Issues
- Safeguarding
- Whistleblowing

A4: Our legal identity, policies and rules

11. Our official, legally registered name is Multiple Sclerosis Society.

12. Your official documents must display our charity and limited company registration details.

13. You must refer to us as the MS Society, or MS Society plus nation suffix (for example, MS Society Scotland).

14. Under charity law, all of our activities must reflect our charitable objects.

15. The Board of Trustees delegates authority via the Chief Executive to our volunteer-led MS Society groups.

16. This gives your group the right to use the following assets:

    - The name Multiple Sclerosis Society, more commonly known as the MS Society
    - Our charity registration numbers and company limited by guarantee number
    - Our official branding
    - Our fundraising merchandise and printed materials

17. You must include our name, brand and charity numbers in all official correspondence and publications. You must not misuse these assets, nor permit their misuse by unauthorised groups or people.

18. As an MS Society group, you must follow all of our policies and rules that apply to volunteers and to groups.

A5: Health, safety and wellbeing

19. All staff and volunteers must comply with our Health and Safety Policy and the systems we have in place to keep us all safe, protect the MS Society financially and protect you from personal liability.

20. You must follow our Lone Volunteering Policy whenever you undertake activities alone on our behalf.

21. We don’t expect our staff and volunteers to make home visits alone and you must never do so.

22. You must complete an Accident Report Form after each accident where a person is injured, no matter how minor the injury. The completed form must be sent to the Health and Safety Team.

23. If your role involves coordinating fitness, property, transport or events, you must understand and use our risk management systems.

24. You must review all risk assessments and events risk guidance annually and also if things change in between reviews.

25. If your group organises a service or activity that aims to give primary carers a break, you must supply contracted care assistants to provide personal care.

26. We don't expect our staff and volunteers to provide personal care and you must not do so on our behalf.

27. All volunteers must report safeguarding concerns to the Safeguarding Responders Group or call your MS Society national office.

28. If a young person (aged 16 or 17) enquires about using a service your group provides, or you are considering setting up a service for young people, you must contact our Quality and Safeguarding Manager for advice before proceeding.

29. Your group must not purchase or accept donations of fitness, mobility or clinical equipment for the purpose of lending it to people with MS.

30. If your group is asked to purchase a piece of equipment for an individual for their sole use, they must submit a Health and Wellbeing Grant application.

31. The MS Society is not responsible for maintenance or repair of equipment awarded as a grant.

32. Services, activities and events organised or co-organised by MS Society groups are covered by our central insurance.

33. You must ensure that your group is adequately covered by any further insurance which may be necessary.

34. If your MS Society group runs a minibus, you must hold a Section 19 Permit and disc to show that you are exempt from certain statutory rules and regulations.

A6: Handling data

35. All MS Society volunteers and staff must follow our Data Protection Policy and Privacy Notice to ensure we comply with the General Data Protection Regulation (GDPR) and protect you from personal liability.

36. We must all take responsibility for ensuring that all personal data we have access to is kept safe and secure, and only used for the purpose/s agreed by the individual.

37. A 'subject access request' is when an individual contacts an organisation to find out what personal information is held about them. All subject access requests must be directed to the Data Governance Team.

38. Whenever you collect personal data from an individual, you must give them our 'privacy statement' of how their personal information will be processed, and for what purposes.

39. Anybody who stops volunteering with us must return all personal data owned by the MS Society to your Coordinating Team within seven days.

40. You must not publish a person's personal data anywhere unless you have their prior consent in writing for the publication you intend to make.

41. You must be discreet with personal information at all times, and maintain confidentiality where necessary.

42. If your group is approached by the Police or any other authority asking for information about a person in anything other than a life or death situation, you must refer them to our Data Governance Team.

43. When not in use, all personal data must be stored securely. Only volunteers in roles that are allowed to use personal data must be permitted access to it.

44. Paper based personal data must be kept in a locked drawer, filing cabinet or cupboard at all times when it is not being used. If you need to take personal data out with you, you must keep it in your possession at all times.

45. Electronically stored personal data must be held in a password protected file on a computer, laptop, tablet, smartphone, or on an encrypted memory stick.

46. With the exception of MS Society email accounts accessed via Office 365, you must not use cloud based storage (for example, Dropbox, Google Docs or Google Drive) to store personal information and data.

47. A 'data breach' is any situation where personal data is made insecure. You must speak to our Data Governance Team to report any potential data breach immediately.

48. You must report a lost or stolen mobile device containing MS Society data to IT Lab as soon as you become aware it is missing.

49. You must use MS Society email whenever you handle personal data by email.

50. When emailing more than one person, you must not disclose their email address to others receiving the email.

51. When emailing members, you must use up to date membership data downloaded from the Portal.

52. You must store written and digital communications securely and never share them with third parties. You can only share an email with another MS Society volunteer if you need their help to reply to it.

53. You must not use a person's email address to communicate with them unless they have agreed to receive emails from us.

54. You must offer people the option to opt out of receiving written and digital information from us.

55. When you receive an unsubscribe request from a member, you must update the Portal or inform our Supporter Care Team.

56. You must complete Data Protection for GDPR eLearning if any of the following apply to you:

    - Your role involves handling personal information, such as a Group Coordinator or Finance Volunteer
    - You have access to membership data
    - You use MS Society email, our Portal or Online Recruitment
    - Your role specific Welcome and Induction Checklist includes Data Protection for GDPR eLearning as 'must do' training

57. You must not use membership data that is more than 28 days old, or that was requested for a different purpose.

58. If a member requests a change to their marketing contact preferences, you must let the Supporter Care Team know as soon as possible.

59. If a person does not appear on a current membership list you download from the Portal, you must not contact them for any reason.

60. You must obtain a person's written consent to use their image or story publicly and keep it on file until one year after the last use of the image or story. Stories and photos must be stored and used for no longer than three years.

61. Membership data must be downloaded from the Portal and not held locally other than for the time it takes to complete a mailing or other task.

62. You must not hold personal data on people who apply to volunteer with us. If a candidate is successful, either email or post their application form to our Supporter Care Team. If you don’t recruit them, you must destroy it.

63. You must post or email Accident and Incident Report Forms to our Health and Safety Team and destroy all copies.

64. Health and safety documents such as Physical Activity Readiness Questionnaires (PARQ) must be reviewed annually and kept for three years after a person stops taking part in a service.

65. If your group awards grants, you must hold grants information for seven years following the issue of a successful grant application. Unsuccessful applications must be destroyed one year after the decision was made.

66. We don’t expect Lead/Support Volunteers to hold personal information about people using your MS Support service, or make case notes about enquiries you have taken, and you must not do so.

67. You must retain personal information such as attendance lists and routine correspondence with individuals about events for one year following the event.

68. Paper records must be shredded or burnt when no longer needed. Electronic records must be deleted from your PC or device’s storage, and the ‘recycling bin’ must be emptied.

69. If your group regularly hires transport or a venue, your service provider must complete a Third Party Data Protection Undertaking Form.

A7: Keeping in touch

70. Keeping us informed of your activities is a requirement for all MS Society groups. We expect you to do this in two ways:

    - Have regular contact with your Local Networks Officer
    - If your group handles money and delivers services and activities, use the Portal to maintain a record of what you provide

71. Before you use the Portal for the first time, you must complete our Data Protection for GDPR eLearning.

72. We will ask you to complete Data Protection for GDPR eLearning even if you have completed previous data protection training.

Part B: If your group handles money and provides services and activities

B1: Availability, contact and communication

73. Your MS Society group must be available to all people affected by MS in the area. This means:

    - People affected by MS in the area know about your group
    - Your services and activities are accessible to all

74. All venues used by your group to deliver services and activities must be physically accessible.

75. Your group must be easy to contact. This means:

    - Having agreed contact details with named volunteers responsible for the task of monitoring each contact method.
    - Having a named contact and contact details for each service and activity your group provides.

76. You must use MS Society email whenever you communicate with external organisations or people by email on our behalf.

77. Whenever you use a group or personal account to represent us on social media, you must follow these rules:

- If you set up a group account, your description, biography or 'about us' section must state that the account is run by a group of MS Society volunteers and that 'Views are our own'.

- When using your personal account, you must add the statement 'Views are my own' at the end of your biography.

- You must not:

    - Post uncorroborated facts, stories or views of the MS Society
    - Share messages that could be considered as defamation towards the MS Society, any member of staff or volunteer
    - Post content, messages or links that could be considered inappropriate or illegal, including content that might offend someone on the basis of race, religion, age, sex, politics, nationality, disability, sexual orientation, gender or any other characteristic protected by law
    - Engage in or encourage any illegal or criminal activities
    - Post, share or forward spam, junk or phishing scams

- All content you post must meet our data protection requirements; you must obtain written consent before posting any form of personal information, including images.

- Comments, messages and mentions will need to be monitored and moderated each day. Respond to each interaction (especially negative comments) with sensitivity and care. Escalate any remarks that are threatening, aggressive or rude to our Digital and Content Team.

78. If the press contacts you about a matter that concerns national, political or research issues, you must contact the Press Office before responding.

79. As a national charity, we must not be seen to endorse one political viewpoint, or one political party, over another.

80. If you are concerned about a potential negative story, you must tell the Press Office straight away.

81. If you are asked to provide a case study, you must follow our guidelines:

    - Make sure the person you ask understands where their story will appear and how many people will see or hear it.
    - Only choose someone who is confident at talking about their MS and is happy to give out their name, age and be photographed.

- If you think you might want to use their information again, you must obtain permission in writing using our consent form.

B2: Using our brand

82. We have a range of logos to suit different purposes. You must ensure you use the correct version and follow these rules:

    - Our logo and registered charity and company numbers must appear on all materials we produce, from letters and leaflets to email newsletters.
    - Our logo must not be redrawn, digitally manipulated or altered.
    - Our logo must have a good contrast with the background and preferably be in the top left corner.
    - Our logo must only be used in relation to MS Society activities.

83. If your group uses social media to share news stories, event images and information about MS, you must use our social media profile image.

84. The Board of Trustees delegates authority to our volunteer-led groups, giving you the right to use our branded materials when you represent us. You must not misuse our brand, or permit misuse by unauthorised groups or people.

B3: Giving information

85. Your group must have agreed contact details with named volunteer(s) responsible for monitoring each contact method.

86. We expect the volunteer responsible for each contact method to read this section of the Group Handbook and use our information resources to deal with enquiries. Our information resources are:

    - Key publications list
    - MS Helpline
    - Local contacts template

87. If your group handles money and delivers services and activities, you must ensure that information about our national grants programme is available to all people affected by MS within your community.

88. We don’t expect your group to give advice and you must not do so on our behalf. If a person needs specialist help, we expect you to signpost to a suitable service provider, or contact our MS Helpline for support.

89. Whenever your group signposts people to products, information or services provided by other organisations, such as in a newsletter or email, you must include our Disclaimer.

B4: Managing your finances

90. If your group handles money, you must follow our MS Society Financial Rules for Groups.

91. Ideally monthly and at least once a quarter, your Coordinating Team must meet to make decisions on behalf of the group and review group finances.

92. When you recruit a new Finance Volunteer, you must:

- Update bank account signatories and correspondence address
- Update HMRC Gift Aid registration
- Inform our Supporter Care Team and Finance Support Team
- Change your Online Accounting log in

93. Each year, we expect your Coordinating Team to put together a plan of what your group will do, and a budget detailing how it will be paid for.

94. If your MS Society group handles money, you must use our Online Accounting system to record your financial transactions.

95. To ensure your Coordinating Team has access to current information, we expect your new transactions to be allocated at least once a month.

96. You must retain and securely store your group's financial records (invoices, paying-in slips, etc.) for seven years to meet HMRC requirements.

97. Each year, your Group Coordinator and Finance Volunteer must review and sign off the MS Society financial rules for groups and submit it to our Finance Team by 31 January.

98. If you answer 'don't comply' to any item on the MS Society financial rules for groups, you must include the reason/s why when you submit it.

99. If you are concerned about fraud or financial mismanagement, contact a member of our Finance Team or an MS Society Director immediately for support.

100. If your group receives a legacy over £20,000, the funds must be sent to MS National Centre for administration.

101. Under our Conflicts of Interest Policy, you must declare any potential conflict of interest and ensure that you do not take part in discussions or decisions made on that subject.

102. Your group is only permitted to bank and hold funds within an MS Society cash pooling account. Your account must include ‘MS Society’ or ‘MSS’ in the name.

103. Your group bank account must have three unrelated account signatories named on the bank mandate who are able to sign cheques.

104. Your group must have its own Charities Reference Number issued by HMRC to claim Gift Aid.

105. You must keep all Gift Aid declaration forms and letters, and sponsor forms on file for seven years from the date of the claim.

B5: Fundraising

106. All MS Society fundraising must comply with the Code of Fundraising Practice and complaints process.

107. Our fundraising standards inform the five important ethical principles we must follow when fundraising for the MS Society - honesty, respect, integrity, empathy and transparency.

108. If you volunteer to fundraise as part of an MS Society group, you must understand the difference between 'on behalf of' and 'in aid of' fundraising. This difference is important as it affects your legal, and health and safety obligations.

109. You must contact your local authority licensing department for advice if you plan to:

- Provide alcohol or entertainment (including recorded music)
- Hold a raffle or lottery
- Do any sort of collection in a public place
- Put up banners or signs in public areas

110. If you volunteer to fundraise as part of an MS Society group, you must understand the following financial matters:

- Our income handling rules
- Gift Aid – how to promote and maximise income
- Earmarking of funds from national offices
- Restricted funds
- Trading activities

- VAT exemptions available for fundraising materials
- Corporate sponsorship

111. Before applying to a local trust, you must discuss your application with your Area Fundraiser or National Fundraising Manager.

B6: Planning and delivering quality services and activities

112. All services and activities your group provides must:

- Align with our strategy and meet the needs of people affected by MS
- Be available to the whole MS community you serve
- Be safe and high quality

113. All services and activities your group provides must meet one of our local priorities:

- We provide social and peer group support
- We support people with MS to be physically active
- We offer emotional support to people affected by MS
- We give information and signpost people to local services

114. Any clinical services or complementary therapies your group plans to fund or directly deliver must meet our agreed definitions and criteria for service delivery.

115. We expect your group to use our service level agreement (SLA) template to set up written agreements with service providers.

116. An SLA must not be used to engage a person to carry out an administrative or organisational function for your group that is being fulfilled elsewhere by local service organisers or other recognised MS Society group volunteer roles.

117. You must involve your Local Networks Officer (LNO) if you plan to develop any service or activity that requires an SLA.

Part C: Running your group

C1: Volunteering with us

118. We only offer volunteering opportunities for individuals who are aged 18 or over.

119. All potential volunteers must apply via Online Recruitment or by completing our paper Volunteer Application Form to enable us to agree with them how we will use their data.

120. All volunteers who carry out tasks on a particular role description must complete the 'must do' training and disclosure checks required of that role.

121. We reserve the right to remove an individual from their volunteering relationship with us if they fail to complete 'must do' training.

122. Whenever you recruit a new volunteer, or an existing volunteer changes role, you must contact the Supporter Care Team to update our central volunteer database.

123. As an MS Society group volunteer, we expect you to take part in a three yearly role review.

124. When the time comes for a volunteer to leave us, you must contact our Supporter Care Team to close their volunteer record.

125. If a Finance Volunteer or another account signatory leaves, you must also contact our Finance Support Team to update the following:

    - Bank account signatories
    - Correspondence address (Finance Volunteer only)
    - HMRC Gift Aid registration (Finance Volunteer only)

126. We only provide factual references, on request. You must not give a subjective character reference on our behalf.

C2: Disclosure checks

127. If your volunteer role involves contact with adults with MS when they take part in certain activities, you must complete a disclosure check before taking up the role. Refer to the relevant policy for roles that need disclosure checks where you are.

128. Disclosure checks must be renewed every three years.

129. Volunteers must not start in a role requiring a disclosure check until the process has been completed, and must not continue in a role requiring a disclosure if they have not renewed their check.

130. Your Coordinating Team is responsible for making sure that anyone who volunteers for your group completes a disclosure check before they start their role, if required.

131. Individuals who provide services on behalf of your group (‘service providers’) may also need to be checked. All disclosure checks must be completed before a service starts.

132. Disclosure checks are free of charge for volunteers, but service providers must pay for their disclosure check.

133. Your group must follow the disclosure process for England and Wales, Northern Ireland or Scotland, including the process for witnessing identity documents, where appropriate.

134. You must not make or keep photocopies of an applicant’s identity documents.

C3: Your Coordinating Team

135. If your group handles money and delivers services and activities, you must have a Coordinating Team that meets regularly to review your finances, plan services and activities, and make decisions.

136. Your Coordinating Team must have a minimum of three volunteers, including a Group Coordinator, a Finance Volunteer and at least one other volunteer.

137. Members of your Coordinating Team must all be aged 18 or over.

138. No more than two members of a family can join your Coordinating Team, and your Group Coordinator and Finance Volunteer must not be related.

139. Your group must not split either the Group Coordinator or Finance Volunteer role between more than two people.

140. Your Coordinating Team must hold a minimum of four team meetings per year to discuss matters and make decisions on behalf of your group.

141. If you hold one of these roles, we expect you to use MS Society email when you represent us:

   - Group Coordinator
   - Administration Volunteer
   - Lead Support Volunteer
   - Finance Volunteer
   - Communications Volunteer
   - Support Volunteer

142. Regardless of the volunteer role you hold, you must also use MS Society email whenever you represent us in these ways:

   - Handling personal data by email
   - Acting as an account signatory on your group's cash pooling account
   - Communicating with external organisations or people by email on our behalf

143. Any decision made by your Coordinating Team via MS Society email must be agreed by all Coordinating Team members. You must record this agreement in meeting notes before the decision can be actioned.

144. Individual volunteers do not have the authority to conduct business on behalf of your group unless they have the agreement of the Coordinating Team.

145. We expect your Coordinating Team to make decisions in line with our organisational values, policies, rules and group requirements.

146. Your group must not create new employment positions. We will only support you to recruit existing roles.

147. You must follow our policies for dealing with Conflicts of Interest and Accepting Gifts and Hospitality.

C4: Membership administration

148. Your group must not charge more than our subscription fee of £5.00 per year, but you can invite additional voluntary contributions from members.

149. A person does not have to be an MS Society member to access our services, nor does membership give any greater entitlement to our support.

150. When a member joins via your group, you must forward their membership form and fee to MS National Centre to be processed.

151. If you become aware of a member's change of details, or the death of a member, you must tell the Supporter Care Team as soon as possible.

152. If a member renews via your group, you must let the Supporter Care Team know so that their membership record can be updated and to ensure that no further renewal reminders are sent.

153. If a member does not appear on a list you download from the Portal list, you must not contact them for any reason.

Part D: Optional additional services

D1: Offering MS Support

154. Your MS Support service must only be provided by Lead/Support Volunteers who have completed Support Volunteer Training and hold a current disclosure check.

155. Our MS Support requirements are the same as those for other services and activities your group may provide.

156. Your MS Support service must meet our MS Support priorities:

- Offering emotional support
- Giving information
- Signposting to specialist advice
- Help to access financial support

157. We don’t expect your MS Support service to offer regular ongoing visits, and you must not provide any of these services on our behalf:

- Shopping
- Gardening
- Meal preparation
- Personal care
- Replacement care
- Companionship/friendship

158. You may be asked to make home visits for people that are isolated. If home visiting is the only possible way to meet with someone, you must ensure that at least two people visit together.

159. We don’t expect your MS Support service to provide the following types of emotional support, and you must not do so on our behalf:

- Counselling
- Befriending
- Complex problem solving
- Dealing with safeguarding concerns
- High end emotional support for strong feelings of anger, sadness, happiness, worry, anxiety, depression and suicidal ideation

160. We don’t expect Lead/Support Volunteers to hold personal information about people using your MS Support service, or make case notes about enquiries you have taken, and you must not do so.

161. You must ask permission from a person before sharing information about them with another Lead/Support Volunteer.

162. Safeguarding concerns are one of the few exceptions to this rule. You must report all abuse or suspected abuse to the Safeguarding Responders Group, even if you have not been able to obtain permission.

163. We don’t expect your MS Support service to offer specialist advice and you must not do so on our behalf. Specialist advice includes:

- Benefits advice
- Other financial advice
- Advice on how to apply for health and social care services
- Care navigation or case work
- Recommending services such as clinical or therapeutic services that are not regulated

164. Only Lead/Support Volunteers who have completed Support Volunteer Training must help people to fill in MS Society grant application forms.

165. We don’t expect your MS Support service to provide the following types of financial support, and you must not do so on our behalf:

- Completing benefits or health and social care assessment forms on a person’s behalf
- Giving advice about what to include on benefits or health and social care assessment forms
- Making decisions about an MS Society grant application you have helped with

166. To offer an MS Support service, all the tasks listed on our Support Volunteer role description must be covered, by one or more Support Volunteers.

167. All volunteers that carry out Support Volunteer tasks must complete Support Volunteer Training.

168. All potential Lead/Support Volunteers must complete a disclosure check before being allowed to offer any new or existing MS Support activity.

169. If your group sets up a *new* MS Support service, you must ensure that all Lead/Support Volunteers complete Support Volunteer Training before starting.

170. New Lead/Support Volunteers joining an *existing* MS Support service can assist current Lead/Support Volunteers to provide activities, but must not offer one to one support until Support Volunteer Training is completed.

Group Handbook X3: MS Society rules for groups v3.3	
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Appendix 4: MS Society financial rules for groups

The Board of Trustees is responsible for keeping adequate accounting records, and the maintenance and integrity of financial information, including the financial transactions of MS Society groups.

To ensure they fulfil their responsibilities, they have set out in this document the boundaries which MS Society groups must operate within when managing their finances.

These rules apply to any part of the MS Society that raises funds in the MS Society name, has an MS Society bank account and/or makes payments on behalf of the MS Society.

Items in these rules where the word 'must' is used must be followed without exception.

Items in these rules where the word 'should' is used should normally be followed. Groups will need to justify why they are not following these rules each year.

Each year the whole of the Coordinating Team must review these rules to ensure their group is following them.

If a group doesn't comply with the rules then:

- Volunteers may be suspended, asked to stand down or removed as a group signatory to their bank account
- The group's bank account may be temporarily closed with funds frozen

General principles		Comply	Don't comply	Justify if don't comply
1	Groups must conduct their affairs for the wider good of the MS Society. This may involve helping other MS Society groups, supporting national projects and sharing resources where required.			
2	Groups must adhere to MS Society policies.			

3	Coordinating Team members must have read the Group Handbook and be aware of their responsibilities, including these rules.			
Reporting and accounting responsibilities		Comply	Don’t comply	Justify if don’t comply
4	Groups must keep supporting documentation for all accounting transactions, including for Gift Aid and for fundraising events, for six years.			
5	Groups must keep accounting records securely.			
6	Accounting records must be made available to Finance Team staff or auditors upon request, along with any additional information required to meet audit or tax obligations.			
7	Groups must use and keep Online Accounting up to date (at least monthly) in accordance with the user guide on Online Accounting.			
8	The Coordinating Team must review group finances on a regular basis: • This should be done monthly but must be done at least quarterly and include reviewing the Online Accounting receipts and payments report and latest bank statement. • Another Coordinating Team member should review income and expenditure transactions on Online Accounting on a regular basis and ensure no third party use of the bank account.			

9	Each year groups must submit to the MSNC Finance Team, by 31 January, the following documents which must have been reviewed by the Coordinating Team: • MS Society financial rules for groups, signed by the Finance Volunteer and Group Coordinator (this document) • a receipts and payments report for the year from Online Accounting			
10	The Coordinating Team should prepare annual plans and budgets each year and measure themselves against those plans.			
11	The Coordinating Team must be aware of typical examples of financial crime (e.g. theft, fraud), have processes in place to minimise the risk of financial crime and report immediately any suspected financial crime to the Finance Team.			
Fundraising and cash handling		Comply	Don’t comply	Justify if don’t comply
12	All incoming cheques and cash must be recorded on the day they are received.			
13	All incoming monies must be banked promptly and regularly and paid into the group’s bank account (at least weekly).			
14	All incoming monies must be banked in full and not used to pay costs or feed petty cash.			
15	Any restrictions placed on the use of donations must be recorded and adhered to.			

16	Monies received for research must be forwarded to the MSNC immediately.			
17	At least two unrelated people must count cash received at fundraising events or from collection boxes. Monies should be counted in the presence of the collector and a receipt given to them.			
18	You should receipt or send out thank you letters for all donations.			
19	Public collections must be undertaken within legal requirements.			
20	Collection boxes must be sealed, numbered, a record kept of where they are, emptied regularly and the takings received recorded from each collection box.			
21	For ticketed fundraising events, tickets must be pre-numbered, and a record kept of all persons issued with tickets to sell along with the ticket numbers they have been allocated.			
22	A record must be kept of all tickets sold and reconciled to money received.			
23	Groups must not raise their own invoices.			
24	Groups should claim Gift Aid.			
25	If a group claims Gift Aid then it must: • Have Gift Aid declarations and confirmation letters for all Gift Aid claimed			

	• Be able to trace all Gift Aid claimed back to individuals and bank statements			
26	The Coordinating Team must obtain approval to engage in trading activity unless it's for activity where approval is not required as per the Group Handbook.			
Expenditure		Comply	Don't comply	Justify if don't comply
27	The Coordinating Team should approve all expenditure.			
28	Cheque stubs must be completed at time of payment.			
29	Documentary evidence must be provided and retained before a payment is authorised, including cash payments.			
30	Support grants should be approved by three non-conflicted people.			
31	Support grants should be paid to the supplier and not the beneficiary.			
32	Groups must not: • Pay for anything which is outside the MS Society's objects • Pay for research except to the MSNC or MS Society national offices • Give out loans • Give out gifts • Offer member related financial benefits • Pay VAT where a group can claim a VAT exemption (as per the Group Handbook) • Give donations to other organisations unless in lieu of			

	payment for services received • Pay money to the NHS for equipment or resources • Enter into lease or hire purchase agreements • Employ staff directly			
33	Any property transaction, whether it is a recurring rental, lease, purchase, or sale of land and/or buildings, must be arranged through the Property Administrator and approved by the Executive Director of Finance, Strategy and Impact.			
34	The Coordinating Team must obtain approval for expenditure: • For amounts between £10,000 and £25,000, approval is required from the Local Networks Manager, Head of Local Networks (in England), Head of Services and Support (Scotland) or Country Director. • For expenditure between £25,000 and £50,000 approval is required from the Executive Director of Services and Support. • For over £50,000 special arrangements will apply – contact the Head of Finance.			
35	Expenses must be authorised by someone other than the payee.			
36	Where expenses are reimbursed, only actual costs incurred must be reimbursed excluding mileage where HMRC's mileage rate must be used. The cost of topping up a travel card (e.g. an oyster card) must not be reimbursed, only the actual cost of an individual journey.			

37	The MS Society expense claim form must be used to claim expenses.			
38	Payments made by cash must be made from a petty cash float and should be kept to a minimum.			
Holding funds		Comply	Don't comply	Justify if don't comply
39	Groups must only hold funds in MS Society approved cash pooling accounts.			
40	Groups must only use a MS Society cash pooling account for MS Society transactions, except for joint events.			
41	Groups must not hold investments including in stocks, shares, property, etc.			
42	Funds (unrestricted and restricted) must be used within a reasonable period of time.			
43	Funds received by groups belong to the MS Society. Groups should not build up reserves so that they have more than 12 months planned expenditure as reserves. If a group has more than 12 months reserves then it should look to reduce these reserves within a three year time period but must do so within five years.			
44	Restricted funds must be fully utilised before unrestricted funds are used. Restricted funds can be utilised by a group once the MS Society receives those funds – this may be before the funds are transferred to the group.			

45	Groups must only use payment cards authorised by the Finance Team.			
46	There should be three signatories on the bank mandate who must be Coordinating Team members and must not be related.			
47	Blank cheques must not be signed.			
48	Those with access to online banking (Barclays.net) must comply with Barclays security obligations.			
49	Groups must review, at least yearly, that any assets held are in good repair and being put to best use by the group.			
Additional rules for shops and groups with buildings		Comply	Don't comply	Justify if don't comply
50	Takings must be recorded on a daily basis and reconciled against till receipts and banking.			
51	Shops must have insurance cover.			
52	There must be an up to date list of assets held.			
53	Unless exempt from rates, a shop must obtain the 80% mandatory rates relief and should attempt to claim the remaining 20%.			
54	There must be adequate segregation of duties to ensure there is a double check on shop transactions.			
55	There must be a written statement of banking and custody procedures held for staff and volunteers.			

56	Incoming post must be opened in the presence of two responsible people and kept secure until opened.			
57	Valuable items must be stored securely.			
58	Safe or cash box keys must be signed for.			
59	A regular stock take should be undertaken.			

Declaration

We confirm that the ____ Group Coordinating Team has reviewed the MS Society financial rules for groups and provided details of any non-compliance.

Signed by:

Finance Volunteer ____

Print name ____

Group Coordinator ____

Print name ____

Group Handbook X4: MS Society financial rules for groups v3.3	
Editor:	Volunteer Resources Editor
Sign off date:	October 2019
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Appendix 5: Code of Fundraising Practice in summary

The Fundraising Regulator sets and maintains the standards for charitable fundraising, and regulates fundraising, in England, Northern Ireland and Wales – and also in relation to many charities, including us, in Scotland.

The Fundraising Regulator holds the Code of Fundraising Practice for the UK. All of our fundraising activities must comply with this code, including how we deal with fundraising complaints.

The Code of Fundraising Practice outlines the standards expected of all charitable fundraising organisations across the UK; this appendix summarises the sections that apply to our volunteer-led groups.

We recommend that you involve your Area Fundraiser or National Fundraising Manager for specialist support to develop innovative fundraising activities.

1. Key principles

Ensuring all fundraising is legal, open, honest and respectful, including use of funds, treatment of donors, reporting of fundraising standards, and complaint handling.

2. Policies

How data protection, disclosure, health and safety, volunteer involvement, expenses, and equality, diversity and inclusion policies must be applied to ‘on behalf of’ and ‘in aid of’ volunteer fundraisers.

3. Communication

Covers use of personal data and marketing contact preferences, following copyright law, legally required information, decency and accuracy in written and digital fundraising communications.

4. Activities

Planning events, lotteries and raffles, trust fundraising, static and public collections, legacies and major donations that meet insurance, licencing and accessibility standards.

5. Handling donations

Reporting and accounting for donations, cash counting and banking procedures, restriction of funds, trading legislation, Gift Aid and VAT, and record keeping.

Group Handbook X5: Code of Fundraising Practice in summary v3.3	
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