

## LINK VOLUNTEER RESOURCES

[We are ambitious](#) in reaching more people affected by Crohn's and Colitis and helping the general public to better understand these conditions. Local networks play a significant role in helping to achieve this in local communities across the UK and the Link Volunteer role is key in working with a team of volunteers to deliver effective and impactful awareness raising activities.

1. [How to coordinate Local Network finances](#)
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### 1. How to coordinate Local Network Finances

A good Finance Volunteer enables the Organising Team (OT) to work effectively together as a team on matters of fundraising and expenditure. Everyone will do this with a different style, but the Finance Volunteer will need to have a mixture of the following skills/attributes:

Organised | Team Player | Reliable | Accuracy & attention to detail | Experience with MS Excel

The expectation is that the Finance Volunteer will liaise effectively with their staff contact in contributing towards the charity's vision, mission and values in the use of Local Network finances.

#### Representing Crohn's and Colitis UK

- Champion the charity's initiatives and campaigns; volunteer in a way that contributes to/reflects national projects (where applicable) and the [charity's values](#).
- Champion the training and development opportunities offered by the charity, ensuring adequate representation from volunteers on the OT.
- Follow the charity's policies and procedures as provided through our Network Volunteering Pack and online Volunteer Resources; ensure that all OT financial activity is conducted in line with this.
- Stay up-to-date with information that affects your role as communicated by the Volunteering Team, e.g. monthly Network Information Update, monthly conference calls/webinars (or delegating to team)

#### Financial

- Liaise with the Lead Volunteer to ensure that income and expenditure is properly accounted for and that accounts are audited annually and sent to the Crohn's and Colitis UK office on request
- Expenditure is a Network decision, but as Treasurer you should say if you believe a proposal for expenditure is outside the Crohn's and Colitis UK guidance provided by the Volunteering Team.
- You need to ensure that any money spent has been agreed by the Network and is 'minuted'.
- Liaise with your staff contact at all stages of the Local Grant process
- Keep in regular contact with the Coordinated Networks Treasurer – this person volunteers with the Charity and supports Link Volunteers in a number of different Local Networks. It is important that you are in touch with them so that you are sufficiently aware of the network's income and expenditure.
- The Link Volunteer will keep a petty cash float and its records, and send all incoming cheques plus all

invoices to the Coordinated Network Treasurer.

- You can request income and expenditure reports from the Coordinated Networks Treasurer, and a balance of the Network's finances at any time. Bring these figures to OT meetings where possible. (These are also useful for the preparation of the Annual Report (to be written by the Lead Volunteer.)
- **Petty cash** should be kept in a locked cash box in a safe place. There should never be more than £50.00 in the box. When a Team member buys a small item, they should get a receipt and present this, with a signed expenses sheet outlining the nature of the expenditure, to the Link Volunteer, who will reimburse them from the petty cash. When the float gets low, the Link Volunteer should request from the Coordinated Network Treasurer a sum of money to bring this up to £50.00. The Link Volunteer will keep a small cashbook or cash sheet showing money going in and out of the cashbox. The cash left in the box added to the unclaimed receipts will always add up to £50 – the float.
- Invoices for any sum which cannot be covered by petty cash should be forwarded to the Coordinated Network Treasurer who will pay the invoice. (If payment is required before the goods or services are provided, ask for a pro-forma invoice which will be paid as above. The Link Volunteer must write on the invoice:
  - 'Expenses claimed on behalf of XXX Network'
  - 'ok to pay'
  - the reason for the payment e.g. hire of hall etc and sign every invoice/request for payment
- **Cheques** should always be posted to the Coordinated Network Treasurer, whether they are made to Crohn's and Colitis UK or to the Network Name. A note attached should state the name of the Network and explain any specific conditions attached, e.g. 'donation – Network use', 'donation – research fund only', 'payment for merchandise', 'sponsorship money from Crohn's and Colitis UK Walk in Birmingham' etc. Payments will be entered by the Coordinated Network Treasurer into an account and recorded as income from that specific Network where relevant.
- **Cash** should always be paid into a branch of Lloyds bank using the paying in book supplied. A note of the amount of cash paid in and its source (e.g. 'raffle at educational event') should be sent to the Coordinated Network Treasurer so that identification is easy on the bank statement. *NB. Do not put cash into your petty cash float – always pay it in and ask for more petty cash as needed.*

## 2. How you are supported

The Volunteering Team are here to support you in your role as a Finance Volunteer. (For Coordinated Network, the Coordinated Networks Treasurer is a crucial point of contact too.)

Contact: [networks@crohnsandcolitis.org.uk](mailto:networks@crohnsandcolitis.org.uk) | 01727 734 475

Each Local Network has a staff member assigned to support you. This staff member will regularly liaise with you as the key financial contact for the Local Network; you will then be able to update the Lead Volunteer and OT as required. Please do contact the staff member on the details they have provided to get access to guidance, advice, support or other resources that will help you in your role.

We are here to help, Monday-Friday 9am-5pm by phone or email and also work out-of-hours on evenings and weekends as required to support you with your role.

You will also find a wealth of resources available to you at [www.crohnsandcolitis.org.uk/vr](http://www.crohnsandcolitis.org.uk/vr)

## 3. How to....handover the role

When you come towards the end of your role as a Finance Volunteer, it is important that you plan sufficient time to effectively handover the role to the incoming Finance Volunteer or to any other interim arrangement made by the Volunteering Team. The handover of information, papers and events/activity is crucial to the future success of the Local Network – ensuring activity runs smoothly after your departure – and this transition to a new Finance Volunteer is seen as an important part of your role.

## Outgoing Finance Volunteer

1. Inform your staff contact of your intention to stand down from the role. (Ideally provide at least six months prior notice.)
2. Discuss with your staff contact the impact that this will have on the Local Network and whether there are any suitable candidates to suggest as future Finance Volunteers. Discuss how best to communicate this information to the rest of the OT.
3. Support your staff contact with information requests e.g. local advertisement as they will be seeking to recruit a suitable alternative.
4. Produce an inventory of all the items to handover to a new Finance Volunteer.
5. The outgoing Finance Volunteer should treat the accounts as though it is the end of year and complete a Financial Return for the Network when they stand down (at the AGM if appropriate). These records should be sent to the Director of Finance & Administration at the Crohn's and Colitis UK office and a copy kept on the Network's file as a record of the accounts. **(Chaired Networks only)**

### *Following the successful recruitment of a new Finance Volunteer...*

6. Arrange to meet with the incoming Finance Volunteer – they will have questions! Handover any physical items (papers, accounts etc.) that they will be required to store at home. Discuss the Local Network's financial activity, plans and issues...being mindful that they may not be familiar with some of the expenditure, e.g. giving local grants.
7. Explain how you have kept the accounts and provide a copy of the Financial Return which will enable them to start their own set of accounts. **(Chaired Networks only)**
8. Invite the incoming Finance Volunteer to an OT meeting, to observe and meet the rest of the OT.
9. Ensure that a record of the current year's petty cash is up to date and handed over with the petty cash to the incoming Finance Volunteer. **(Coordinated Networks only.)**
10. Ensure that all current invoices and donations have been sent to the Coordinated Networks' Treasurer. If there are any outstanding, ensure that a list is prepared and handed to the incoming Finance Volunteer. **(Coordinated Networks only.)**
11. Ensure that you are removed as a signatory to the bank account mandate – and that the incoming Finance Volunteer is added - so that they can fulfil the role. **(Chaired Networks only.)**
12. Be available for a short period (4-8 weeks) after the arrival of the new Finance Volunteer, in case they have any appropriate questions during this initial period.
13. Keep your staff contact up-to-date and in the loop as you work through this process.

*If your intention is to stand down from the Finance Volunteer role but stay involved on the OT as an Awareness Volunteer, be prepared to completely stand down from the OT at the request of your staff contact. In some instances it is helpful for incoming Finance Volunteers to 'find their feet' without the presence of the previous Finance Volunteer on the team.*

## Incoming Finance Volunteer

1. Meet with the outgoing Finance Volunteer to collect an inventory of any financial resources or other information you might require. Certain paperwork will need to be stored at your home for use with the Local Network.
2. Ask questions! Your meeting is an important chance ask questions of the outgoing Finance Volunteer – your staff contact can advise you, but you may find it useful to know: what /how much financial activity the OT is involved in; what are the passions of the existing OT in terms of fundraising or expenditure; whether there have been/are problems to solve in processing financial activity; upcoming training/development days etc.
3. Attend one or more OT meetings to observe how activity is currently conducted and meet the OT.

4. Afterwards, ask questions of the outgoing Finance Volunteer and your staff contact where necessary.
5. Ensure that you are added as a signatory to the bank account mandate – and that the current Finance Volunteer is removed - so that you can fulfil your role. **(Chaired Networks only.)**
6. Contact the Coordinated Networks' Treasurer within two weeks of taking the role – they will provide some welcome information, contact details and guidance. **(Coordinated Networks only.)**
7. You may find it beneficial to contact the Outgoing Finance Volunteer whilst in the first few weeks of your role – they *may* be available for the first 4-8 weeks.
8. You may find it beneficial for the Outgoing Finance Volunteer to remain involved as an Awareness Volunteer on the OT. If you are interested in having them stay involved, you can encourage them to do so. However, there are aware that you may choose to have space to 'find your feet'.
9. It is crucial that you diarise regular catch-ups with your staff contact, so you can both plan time effectively. They will be there to help you with your volunteering, assist you in completing the induction and many other aspects of the role.
10. You may also find it helpful to meet with the Lead Volunteer to discuss the Network's finances.