



HUMAN RESOURCES

April 27, 2012	CC:
<u>New Hire Onboarding Effectiveness Questionnaire</u>	

The Learning Team's 2012 implementation plan includes developing a framework for a Society-wide Onboarding Program. As part of this strategy development, the team is conducting a questionnaire to determine the effectiveness of current onboarding practices and efforts in assimilating new employees into their position and the Society. All current employed staff hired or transferred between 1/1/2011 and 3/30/2012 will receive an e-mail with a survey link and instructions on early May 1st.

The objectives of this questionnaire are to solicit feedback on experiences and engagement during the pre-boarding/recruitment process and to identify the effectiveness of current Onboarding efforts to successfully assimilate new employees into their position and the organization. This feedback will be essential as we begin to develop the framework and components of a Society-wide Onboarding Program in 2012.

Thank you in advance for your feedback on this important initiative.

If you have questions about the Learning Team's onboarding initiative, contact janet.mills@nmss.org

For information about the questionnaire, please contact Eileen.williams@nmss.org



PROGRAMS & SERVICES

April 27, 2012

CC:

Financial Assistance Program Policy Clarifications

During the March Teletraining about the Society's financial assistance program, questions were raised about some of the policies associated with the program. The Finance and Programs and Services Departments have created a document that responds to these questions. Below are highlights, please refer to the complete document for details. The document addresses:

- 1099 Forms:
 - You must issue a 1099 form to clients who receive a total of \$600 or more in financial assistance in a calendar year *when the check is payable directly to them.*
- Policy around contracts with and/or insurance documentation for vendors:
 - Before engaging an independent contractor, you must receive a signed and dated contract including documentation regarding required licensure and insurance coverage.
 - If the contract is with an agency, the agency contract shall include a clause in which the agency assures that all of its agents, who enter client homes or otherwise have the potential for physical contact with clients, have undergone background checks including sex offender.
 - If the contract is with an individual, who will enter client homes or otherwise have the potential for physical contact with clients, the individual will provide written permission for the Society to conduct a background including sex offender and the background must be successfully completed before engaging the services of the independent contractor.
- Gift cards and transportation vouchers:
 - Gift cards may be acquired for use as special event prizes or as a means of providing direct financial assistance.
 - Gift cards can have significant cash value and therefore must be treated with appropriate internal controls. Gift cards should be locked in the same secure

location where other valuable documents are maintained. An inventory of all gift cards shall be maintained.

- When disbursed, the spreadsheet should be updated to indicate the recipient and the reason.
- Gift cards that are acquired to provide direct financial assistance for people with MS shall be coded 1365-100-657-0000 (Prepaid for Other DFA); when disbursed, they shall be re-classed to 5330-100-6xx-xxxx (6xx whatever DFA the gift card is for if Food or Gas, etc...).
- Leveraged Funds
 - See guidelines in the PSDEP for definitions and coding for leveraged funds.
- Loan closet expenses
 - Loan closet equipment pick-up expenses are a program expense and should be charged to 5215-100-677-0000.
 - Loan closet equipment repairs and deliveries for a specific individual are considered financial assistance and are recorded as 5330-100-677-0000.

This document can be found on SharePoint by clicking here:

<..\2012\Financial Assistance Program updates april 2012.pdf>

Please contact Craig Weber (craig.weber@nmss.org) or Melissa Perlin (melissa.perlin@nmee.org) if you need additional information.

For other questions about coding and recording financial assistance, contact Jessica Roeder (jessica.roeder@nmss.org).

Questions? Contact Debra Frankel, VP-Programs and Clinical Field Support (debra.frankel@nmss.org)



PROGRAMS & SERVICES

April 27, 2012	CC: Chapter Presidents
	Development
2011 Stepping Stones Annual Report and Updates	

As our highly successful Stepping Stones program moves forward into its fifth full year, we will again take this opportunity to provide an update, thank you for your participation, and share some tips that will help streamline the application process for everyone involved and especially for the clients we are working to help.

The Stepping Stones program as it exists today is made possible through the generous support of Greater New England Chapter and National Board Member Richard Slifka. The foundational premise of Stepping Stones is to use Society dollars to leverage community resources in situations where the need is great and the funding can make a life changing difference for an individual or family living with MS. In 2011 \$119,409 was expended from the endowment, and these funds leveraged \$150,668 in community dollars, \$72,602 from chapters and \$146,639 from clients/families for a total of \$489,318. This funding allowed 80 clients from 29 chapters to meet the financial challenges of MS. The annual report is available on SharePoint at the following location:

http://intranet.nmss.org/Topics/programs_services/Documents/Forms/Financial_Assistance_Stepping_Stones.aspx

We have already allocated \$70,103 for FY 2012 from the Stepping Stones endowment and need your assistance to provide continued support for the full year. Your diligence in investigating every possible avenue to leverage funds from other community resources is imperative before funds can be released from Stepping Stones. This combination of client, chapter and community resources along with our endowment will help us to stretch the endowment dollars for not only this year, but future years as well.

Application Process

We know that often Stepping Stones requests are for urgent needs. Understanding this, we try to process applications within 2-5 business days. When we have to return an application to you for further information, documentation or more research into possible supplemental funding, it slows down the process—and we know that is frustrating for all.

You can help us to expedite your applications by adhering to the following processes:

- Always access the Chapter Request Form from SharePoint to ensure you are using the most updated materials. (SharePoint/Programs and Services/Financial Assistance Resources/Stepping Stones Information and Forms/Stepping Stones Chapter Request Form).
- Provide detail about all of the community resources approached by both the client and chapter, including the outcomes in the “other community resources approached” section of the Chapter Request Form. Please include both those that contributed and those that denied your requests. If you are not having success and need ideas about where to look for additional funding, please consult with Kristin Meyer or Adrian “Skip” Dargan before submitting the application.
- Document any “special circumstances” surrounding the request.
- Explain chapter funds provided. There is an expectation that the chapter will contribute generously – to the maximum or even more than your usual financial assistance policy limits.
- Please include the address of the main chapter office, even if the request is coming from a branch office. (Checks are mailed from our Finance Department to the chapter’s primary address and not to local office addresses).
- Forward application forms to Kristin Meyer at the TRC.

A sample of a thoroughly completed Chapter Request Form is located in SharePoint as a guide to assist staff in completing the form.

Client Acknowledgements:

Please forward any before and after pictures or client thank you letters to Kristin Meyer. The results and outcomes of Stepping Stones and the expressed appreciation of those who have benefitted are heart-warming and compelling. We not only compile the yearly data, we also use the stories of those who are helped to tell our story to donors.

Donor Interest:

We would very much like to grow this program and serve more clients. If you have donors who might be interested in making contributions to Stepping Stones, please contact Mary Milgrom at Mary.Milgrom@nmss.org, 303-698-6103 or Carrie Radant carrie.radant@nmss.org, 303-698-6100 ext. 15165). Chapter Honor Roll contributions can also be made to Stepping Stones.

Thank you again. We hope that it is as gratifying for you as it is for us to think about the lives that have been changed because of Stepping Stones and all of our Society financial assistance programs. We value your partnership.

For more information please contact Kristin Meyer at 303.698.6100, Ext. 15282 or Kristin.Meyer@nmss.org.