

## **Volunteer Agreement**

Financial Training/Office of the Controller/Office of Business and Finance  
FinancialTraining@osu.edu

**Thank you for your interest in becoming a volunteer on behalf of the Financial Training Department (FTD). We appreciate your willingness to share your knowledge and expertise with the fiscal community.** Financial Training presents the concepts of financial policies and procedures in place at The Ohio State University. We offer free workshops and experience sessions as a service to the university community.

### **FTD Standards**

In an effort to maintain high quality, consistent training, FTD has established for volunteers. Signing this agreement indicates you agree to adhere to FTD Standards.

### **Volunteer Process**

1. Complete the Volunteer Agreement form and email to [FinancialTraining@osu.edu](mailto:FinancialTraining@osu.edu).
2. A FTD representative will contact you to discuss:
  - a. the instructional process (if instructor)
  - b. the design process (if a curriculum reviewer or subject matter expert)
  - c. the pilot process (if participating in pilot class as a learner)
3. **Volunteer instructors** must participate in a “Train-the-Trainer” program.
  - a) This currently consists of two sessions over a six to eight week period. The first session is a “Get Acquainted” session. We will review FT standards, training content for assigned class, use of equipment, discuss training methods, and answer questions.
  - b) An additional session will allow for practice with a small audience consisting of a few observers and the trainer. During these sessions, the trainee practices their presentation. They will gain tips for dealing with different audiences and review feedback given by those who are present.
4. **Volunteer subject matter experts:**
  - a. Provide expertise during the design process regarding procedures, concepts, etc.
  - b. May participate in sessions to step out best practices, scenarios, etc.
5. **Volunteer curriculum reviewers** review curricula for:
  - a. Accuracy and clarity of information
  - b. Adherence to OSU style guide
  - c. Compliance with Business & Finance polices, practices, and recommendations
  - d. Grammar and spelling
6. **Volunteer pilot participants:**
  - a. Attend as a learner in the entire training pilot.
  - b. Actively engage in an evaluation discussion after the pilot session.
  - c. May look at any major edits to content or activities post-pilot.

### ***All Volunteers***

- Fulfill their volunteer duties in a professional manner reflects positively upon the FTD department.
- Commit to at least one year as a volunteer.
- Abide by all applicable policies, guidelines and regulations of The Ohio State University’s Office of the Controller within the Office of Business and Finance.

### ***Instructors***

- The instructor agrees to deliver at least three sessions each year.
- The instructor will follow the content as designed by the FTD department.
- The instructor will avoid expressing differences of opinion or dissatisfaction with University policies or procedures when leading a class.

## Volunteer Information

Name:

Name.#/Email:

Office and Cell Phone:

Supervisor Name and Number:

I am interested in volunteering as: (select all that apply)

Instructor	Subject Matter Expert
Curriculum Reviewer	Pilot Participant

- Please describe your fiscal experience.
  
- Please describe your teaching, training, or coaching experience:
  
- Please list the topics/classes that you are interested in assisting with:

### Acknowledgement

I, \_\_\_\_\_, agree to follow the standards and guidelines established by the Financial Training Department when delivering training content.

Signature

Date

### Approvals (if necessary)

I approve \_\_\_\_\_'s participation as a Financial Training volunteer as outlined in the standards and guidelines.

Supervisor Signature

Date