

Sound Screening & Training Practices: Foundation for Impactful Engagement

VAN NW Annual Conference

June 24, 2016

Session Objectives

By the end of this session, participants will be able to:

- Examine their organization's *early-stage* volunteer policies and practices using a risk management lens
- Determine which *early-stage* volunteer policies and practices need clarification, improvement, adjusted risk and/or consistency of practice
- Begin a discussion with decision-makers for instituting change

Risk Management Primer

“Risk management involves peering into the future and making decisions today that will protect the mission and programs of a[n organization] no matter how that future takes shape.”

--Nonprofit Risk Management Center

Volunteer risk management means understanding, preparing for, mitigating and accepting potential risk involved with engaging volunteers within an organization. Volunteers, whether serving as members of the Board, in administrative or direct service roles, should be considered in the organization’s risk management plan and strategic plan.

Three Elements of Risk

(1) Liability	A legal obligation, something owed to another. The program's potential responsibility for the actions or inactions of its agents.		
		Example	Risk Mgmt Strategy
(a) Direct liability	When an organization or individual is held responsible for its actions or inactions	Failing to properly supervise a volunteer	Documented supervision of volunteer
(b) Indirect or vicarious liability	When an organization is held responsible for harm caused by persons acting on its behalf	Negligence of a volunteer driver who damages a parked car during duties	Provide behind-the-wheel driver training to volunteers
(c) Strict liability	When responsibility for harm is automatic and finding negligence or misconduct is not required	Volunteer is under the influence of an illegal substance	Anti-substance policy; Volunteer screening criteria; Appropriate response
(2) Exposure	Provision of service created a degree of exposure to potential liability		
(3) Insurance	To cover any loss related to property damage or personal injury		

Risk Management Strategies

(A) Avoidance	Cancelling a service or activity in which the perceived risk outweighs the benefit
(B) Modification	Adjusting policies, plans and procedures to reduce potential loss to a level deemed acceptable to the organization
(C) Sharing	Partially transferring an activity or the consequences of a risk to another party by contractual agreement
(D) Retention	Accepting all or part of the risk and preparing for the consequences if a risk scenario should become a reality

Effective Risk Management Strategies

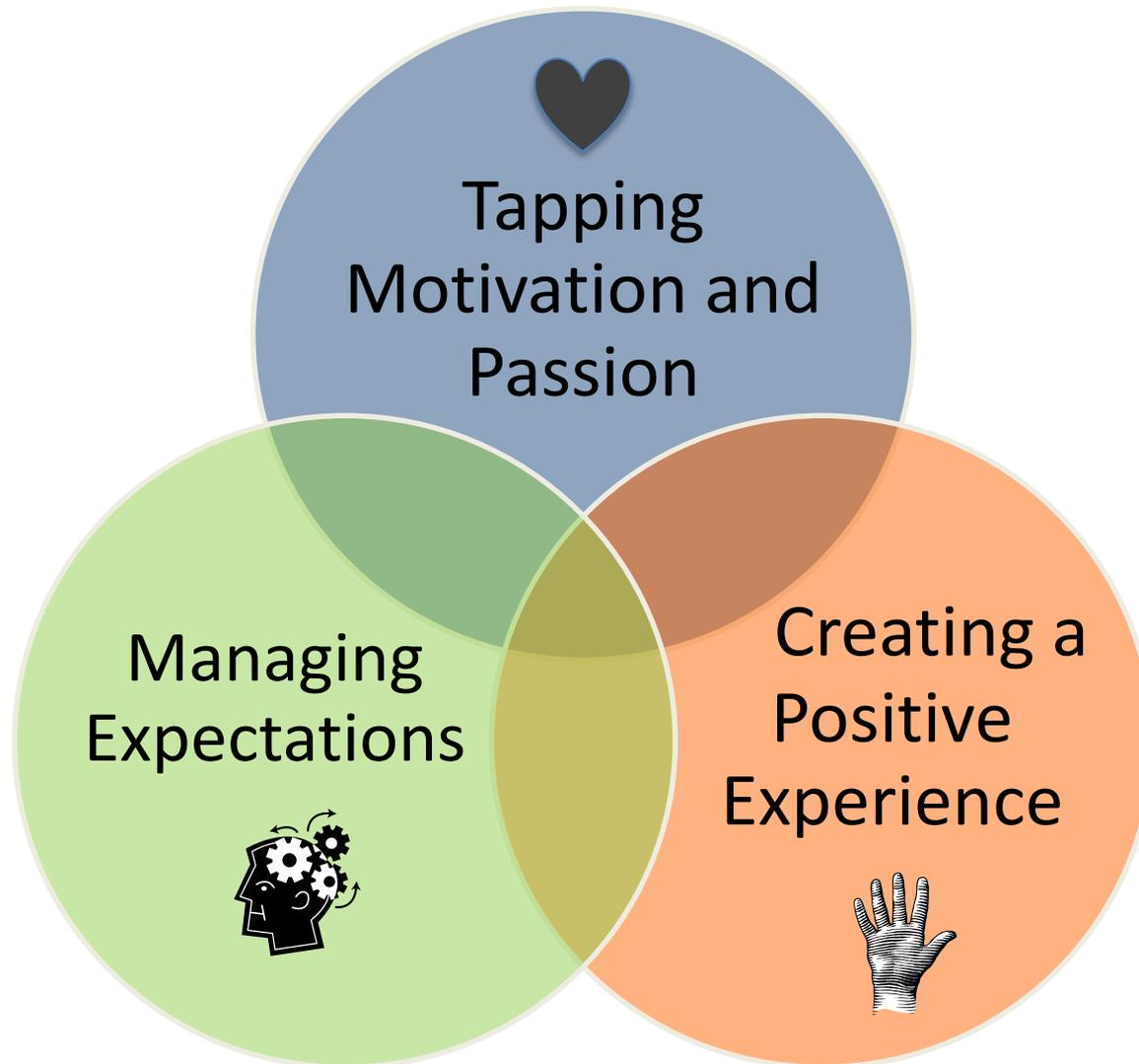
Consistency
of
Practice

Communicate
Expectations

Insurance Coverage

- Types of policies:
 - Directors & Officers (nonprofit Board & staff)
 - Worker injury
 - Volunteer personal liability
 - Auto liability (personal vehicle)
 - Volunteer driver excess auto liability (p. vehicle)
 - Non-owned auto liability (agency vehicle)
- Consult your insurer

Volunteer Engagement



Elements of Volunteer Management

(adapted from Susan J Ellis Volunteer Management Audit)

- Planning & resources
- Volunteer work design (volunteer position descriptions + union bargaining)
- Recruitment
- Interview & screening
- Orientation & Training (orientation = org. ; training = duties)
- Volunteer-Employee relationships (includes Supervision)
- Recognition
- Recordkeeping & reporting
- Volunteer input (also, Development and Retention)
- Evaluation
- Cultural fluency (woven through all other elements)

Full Group Exercise

What is your organization doing (or not doing) relative to engagement of volunteers that concerns you the most?

Volunteer Work Design & Policy

- Forms of volunteer engagement: *example*
 - Ongoing (weekly, monthly)
 - One-time or Episodic
 - Unpaid Intern
 - Job Shadow
 - Ride-alongs
- Volunteer policies & procedures document (Handbook = user-friendly version) *example*

Volunteer Work Design

- Volunteer position description: *example*
 - Every volunteer assignment/role should have one
 - Union bargaining & HR review
 - Serves as a volunteer contract and communicates expectations; Require the volunteer to sign
 - Should include duties, qualifications, supervision, duration & benefits
 - Extra considerations for internships *resource*

Recruitment

- “Build it” before you seek/recruit:
 - Get position description, supervision, workspace, timeline established
 - Communication between recruiter and requester
- Timely response to new inquiries
- Inquiry/first contact:
 - Learn person’s interests, goals, availability
 - Communicate expectations (share position descriptions)

Screening:

consistency of practice

- Inquiry interactions
- Interview
- References *example*
- Background check (state, national, local PD)
- Disqualifying events *example*
- Access to vulnerable populations *resource*
- Volunteer driving = Driving records check

Placement

- Use info gathered from screening
- Match availability, talents, personalities
- Culture of feedback and communication
- Follow-up with parties after the placement
- If not good first match, gather info, then try another

Orientation

Orientation = big-picture, organization, culture

- Consistent requirement for new volunteers (all or definitive subset)
- Volunteer Handbook *sample*
- Cover mission, how volunteer role furthers mission, expectations *example*, pertinent policies & practices, safety, supervision, liability protections, hours recording, short org history
- Require volunteers to sign orientation form

Training

Training = knowledge and skill to be successful at specific volunteer assignment

- Should be done by direct supervisor, not VC
- Checklist for supervisors is helpful
- Should be concluded by end of 2nd shift
- Empower volunteer to ask for training review
- Training also includes proper access to and safe use of equipment, facilities, information

Small Group Exercise

In groups of 3-4 persons, address this question:

What current volunteer policy or practice do you want to improve?

Discuss the following:

- *Briefly describe the existing policy, practice or item.*
- *What are the risks of not addressing it?*
- *Who in your organization should be involved?*
- *What resources can you access to review, and ultimately implement change?*

...or Full Group Q&A

Thank you.

Presenter

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