

Something Old, Something New, Something Borrowed, Something You



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Several years ago during the weekend before a *Risk Summit*, I spent some time with my family in New England and wound up as a second-year participant in sixth year of the *Pewter Run*, a timed event for those who love to collect, ride (and repair!) vintage and antique motorcycles. The event, which is sponsored by the United States Classic Racing Association (USCRA), begins in historic Hillsborough Center, NH and winds its way through the scenic New Hampshire countryside, covering 40 miles. Riders depart at 30 second intervals and this year the timed ride was one hour and 54 minutes. Throughout the journey we encountered several determined riders at the side of the road. In a couple of instances the stranded rider was doing whatever it took to get his vintage machine running. For most entrants a small adjustment was all that was needed to get back on the road. Unfortunately, a couple of riders wound up in the DNF (“did not finish”) category and rode back to the start in a “sweep” vehicle with their uncooperative machine strapped to a trailer.

Just prior to heading off for the *Pewter Run* I had an opportunity to chat with my sister about her upcoming nuptials. While riding my Dad’s 1955 Norton Dominator, I pondered the traditions associated with marriage ceremonies. One that came to mind immediately was the tradition of wearing “something old, something new, something borrowed and something blue.” It occurred to me that this oft-repeated expression could be converted to helpful, if not lucky risk management advice with a small, but important adjustment.

- **Something Old** — The annual *Pewter Run* is all about celebrating the old and the classic. This year’s ride reminded me that there is often much to celebrate in the risk management programs of nonprofit organizations. Recently I’ve been rereading a terrific book on reference checking (*The Complete Reference Checking Handbook*, by Edward C. Andler). Reference checking could be described as an “antique” screening tool. Long before nonprofit employers could order “criminal history background checks” on prospective paid and volunteer staff, they could pick up a telephone to check an applicant’s references. Thankfully many employers continue to use this tool. In our view, reference checking remains an essential and potentially invaluable screening tool. The book offers some terrific, practical tips. One suggestion is to call a former employer of an applicant and ask for the opportunity to read the candidate’s description of their prior position. The author, Edward Andler, reminds his readers that if after reading the description the former employer begins laughing hysterically... well, then you may have a problem. Another tip was to ask a former employer to list some of the items noted as “areas for improvement” on the candidate’s most recent performance evaluation. Andler reminds his readers that

they are likely to encounter less resistance when asking for factual information versus a new judgment or opinion. When bright leaders join the management team in a nonprofit an “in with the new, out with the old,” approach often accompanies the new leader, particularly if they hold the position of CEO. And new arrivals are frequently eager to tout and demonstrate the successes they achieved at prior places of employment. Long-standing risk management strategies may be victims in an “out with the old” exercise. But wait! There may be gold in those tried and tested approaches. Instead relegating long-standing practices to a bin of relics look for the value they offer and explore ways to replicate or repurpose what is working. During the *Pewter Run* this weekend I couldn’t help but overhear some of the more enthusiastic “gear heads” waxing poetic about the beauty of the older machines. And in most cases they weren’t referring to the paint! They were commenting on the inspired engineering found in Brough, Norton, HRD Vincent, Zundapp and Harley-Davidson bikes from the pre-World War I to post WWII era.

- **Something New** — Appreciating classic approaches to risk management, such as reference checking, doesn’t mean that there isn’t room and that it isn’t time for something new. One of the decided benefits of bringing in new personnel—from other nonprofits, from the business world, and from public service—is the opportunity to learn from the outside. If you haven’t tried something new to manage your organization in the face of risk and our changing world, you may be falling behind. Relying solely on what has worked in the past is in itself a risky approach. Your nonprofit is changing (even if you’re trying to stand still) and the world around you is changing in sometimes subtle and hard-to-see ways. What’s new? Does your technology policy include guidance on the use of social media in the workplace? Are employees and volunteers clear about whether you encourage, restrict or prohibit the use of social media tools to promote your nonprofit’s mission and services?
- **Something Borrowed** — From time to time, it’s okay to borrow, although I’d strongly advise against begging and stealing. And if we’re talking about “best practices” and effective training techniques, there may be no need to return what you’ve borrowed. I often encourage nonprofit leaders to learn from others. In fact, the attendees at the Center’s conference next week will be doing lots of learning and borrowing from our faculty of risk management experts. Like the proverbial request to “borrow” a cup or sugar or an egg, one need not look far to borrow effectively. When hunting for great risk management ideas your first stop might be a neighboring social services agency, similarly-focused arts organization, or a nearby chapter or affiliate of a national nonprofit.
- **Something You** — Now that you’ve searched your closets, files, and networks for “something old” to make new again, welcomed the bright ideas of newcomers, and borrowed a tip or two from a neighbor, it’s time to get creative. In my work as a risk management consultant I see lots of “borrowed” and “old” strategies, and the occasional new approach. What is least common is the custom-fit, made to order strategy that suits a nonprofit like the classic saddle seat on my Dad’s 1925 Norton Model 16H. Let’s face it, borrowing seems faster and cheaper. But in the real world of a complex nonprofit organization a neighbor’s screening program, code of conduct, board orientation or evacuation policy may be as safe as a secondhand child safety seat. I encourage you to identify those areas where only custom-made will do. What aspects of your nonprofit’s mission, clientele, focus and services warrant customized risk management approaches? Organizations with multiple service sites in diverse parts of a community may require site-by-site, interlocking business continuity plans. A nonprofit with highly experienced technical experts on the senior management team may require a succession plan that goes far beyond the average. And an agency whose clients include young people with severe disabilities may need to create a youth protection protocol that is based on the one-to-one contact that its clients require, rather than a more common program that prohibits one-on-one caregiver-client contact. At next week’s *Summit* we will re-release *My Risk Management Policies*, an online tool that helps leaders create custom policies from scratch... in minutes. The tool, found at www.myriskmanagementpolicies.org, is a terrific example of the fact that a customized solution doesn’t have to be expensive or time-consuming.

There is no secret formula when it comes to managing an organization in the face of risk. By remembering the expression we often associate with good luck at a wedding and adding a twist, I hope you’ll be inspired to look for a wide range of risk management approaches, including the proven, the inspired, the readily available and the truly unique.

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