

Mastering the Basics: Learn to Walk Before You Run



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During a lunch meeting today with three colleagues from our Toronto affiliate—the *Insurance and Liability Resource Centre for Nonprofits* (www.nonprofitrisk.imaginecanada.ca) —the Centre’s Manager, David Hartley reminded me that many of the Canadian nonprofit leaders who attend the Centre’s workshops are eager to undertake the equivalent of a risk management marathon without the requisite warm-up and training period. David recently advised a nonprofit leader that although developing a CEO succession plan was a laudable move, creating position descriptions was a requisite first step. Walk, before you run.

Our conversation at lunch reminded me of a wonderful scene from the new film “Julie & Julia.” In the film Julia Child is embarrassed during her first day at a Parisian cooking school when she realizes that her knife skills are less than those of her fellow classmates. Her careful slicing of an onion leads to some snickering by her fellow students, each of whom deftly slices and chops onion after onion. Upon arriving home from work that evening, Julia’s husband Paul finds her in the kitchen with an enormous mound of chopped onions. Practice makes perfect! The scene is a wonderful part of the story of Julia’s transformation as a chef. It’s also a terrific reminder that like French chefs, we need to master the basics before moving on to the equivalent of a risk management soufflé or duck stuffed with meat and baked in pastry.

At the Nonprofit Risk Management Center we’re fortunate to encounter nonprofit organizations and dedicated leaders who are at various stages of their respective risk management journeys. We welcome calls from leaders who are just getting started with the basics, as well as the opportunity to work with leaders who are exploring sophisticated strategies to better integrate or strengthen their risk management programs. In recent weeks we have advised leaders of large nonprofits about topics ranging from adopting an “enterprise risk management” framework, to developing long-term plans for a captive insurance company or sponsored insurance program, designing easy-to-use training materials for a large audience of affiliates and elevating the discussion of risk-taking and risk management to the board room.

A reminder about the “basics” is good for all of us. Consider the following examples.

- **Position descriptions**—A position description is the starting point for success on the job. Take time to create position descriptions for all vital roles in your nonprofit (paid and volunteer). Make certain you include key duties and responsibilities and give applicants (and new hires/new volunteers) opportunities

to seek clarification.

- **Risk management goals**—Goals for your risk management efforts are necessary if you hope to know if you're "there yet." What are you trying to accomplish? For some nonprofits, risk management goals including inspiring confidence in service volunteers and the board, reducing mishaps and ensuring an appropriate, compassionate response in the event of an incident.
- **Written agreements with partners**—During a roundtable I attended this week one of the participants asked the leaders gathered "what guidelines should I follow in developing a sponsorship program?" My response to the participant was to consider "what could go wrong" and take the time to memorialize the expectations and requirements of both parties in a written contract. Too often partnerships get off and running without a summary of the parties' expectations.
- **In-service training**—Many nonprofits provide training for new employees and volunteers. This training helps new recruits get off to a good start. But don't forget about the importance of in-service training, to hone skills, introduce new policies and procedures, and improve teamwork. In recent weeks we have developed a series of webinars for the staff of a large youth-serving nonprofit with nearly 3,000 affiliates. Programs like these are an affordable alternative to on-site training. As a bonus, online programs can be viewed at the staff member or volunteer's convenience.

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