

Nonprofit Risk Management Center
...find the answer here

Back to School: Orientation, Education and Training

September 1, 2010

presented by
Carlye Christianson
Senior Counsel and Director of Special Projects
carlye@nonprofitrisk.org

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Goals of orientation and training

- Understanding
 - Nonprofit structure
 - Difference between for profits and government entities
 - Broad and varied constituencies
 - Mission
 - Each person's roles, responsibilities
 - Policies
- Building a team
- Share responsibility for effective risk management

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Why worry?

- Ineffective programs
- Unsuccessful mission
- Unable to understand
 - how to innovate,
 - how to assess program or organizational success
 - how to anticipate crisis
 - how to assess risk
- Inefficient structure

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Prongs of an educational program

- Orientation – learn about and become conversant with the unique aspects of the organization.
- Training – teach about the roles and responsibilities.
- Development – raise the quality of the effort.

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Why board orientation?

- for the board member:
 - initiation to service;
 - introduction to organization;
 - clarification of future demands;
 - introduction to other team members; and
 - form foundation for the coming years.
- for the board
 - educate members for being engaged; and
 - ensure that members are functioning within the same framework and with the same instructions.

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

The Board Orientation

- Introduction of members
- Provide history, evolution and goals
- Identify issues, challenges and key trends.
- Provide information on policies and procedures.
- Outline roles and responsibilities of staff contrasted with those of the Board.
- Visit and tour of any of the organization's offices and facilities.

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Board manual

- Vision, Mission and Goals including strategic plan
- Organizational chart including a list of committees (with a statement of purpose for each) and contact information
- Description of programs and services
- Financial information
- Description of the Board's role
- "Job" or position description for Board Members
- Staff structure and description of major roles
- Board policies
- Information concerning Directors' Liability Insurance
- Meeting protocols

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Board training and development

- Mission
- Oversight and evaluation
- Resource development and preservation
- Outreach
- Self assessments

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Staff and volunteer orientation

- Organizational structure
- Programs
- Roles and responsibilities
- Policies

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Staff and volunteer trainings

- Benefits
- What are usual practices for training?
- Who will do training?
- How will training be delivered?
 - Individual or group
 - Live or on line
- When will training be provided?
- How will training be evaluated and documented?

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Purpose of trainings

- Reinforce goals and expectations for service delivery as well as behavior.
- Explain what is and isn't appropriate behavior and why.
- Emphasize need to understand the consequences of inappropriate behavior as well as the nonprofit's commitment to apply these consequences evenly and without regard to pay status.

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Common topics

- Communications
- Computer skills
- Customer service
- Diversity
- Ethics
- Human relations
- Quality initiatives
- Safety
- Sexual harassment
- Program performance
- Program introduction
- Risk management

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Effective training

- Create a conducive atmosphere.
- Choose different modes to get your message across and to address certain issues
 - (facilitated discussions, small group exercises, case studies, etc.).
- Choose the right focus.
- Discuss team work.

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

In person training

<p>Pros</p> <ul style="list-style-type: none"> • Opportunity to pose questions to the trainer • Networking with others • Ability to focus on training topic (away from distractions at the office) • Easy to customize presentation to the audience — both in advance and on the spot 	<p>Cons</p> <ul style="list-style-type: none"> • Cost may be out of reach or necessitate limiting training program to short list of topics and/or small percentage of personnel • Time-away from the office and other pressing matters • Time consumed on participants' questions
---	--

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

On line training

<p>Pros</p> <ul style="list-style-type: none"> • Convenient — courses available at a time convenient to the trainee • Immediate — test scoring and feedback is instantaneous • Affordable — average cost is generally far less than on-site training • No Lost Opportunity Costs — no lost work time traveling to and from the training site 	<p>Cons</p> <ul style="list-style-type: none"> • Impersonal • Most programs offer limited or no networking opportunities • Accommodates one learning style
--	---

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Evaluating the program

- Testing
- Self assessments
- Performance reviews
- Attendee interchange
- Attendee feedback
- Community feedback

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Other resources from the Center

Pillars of Accountability: Risk Management Guide for Nonprofit Boards

Taking the High Road: A Guide to Effective and Legal Employment Practices for Nonprofits

No Surprises: Harmonizing Risk and Reward in Volunteer Management

www.nonprofitrisk.org

Nonprofit Risk Management Center
...find the answer here

Next month's Webinar

October 6, 2010 2 p.m. Eastern

Got Resources? Risk and Reward in Resource Development

Fundraising takes more time than ever. Explore the risks and identify practice strategies when asking for and accepting the support your nonprofit needs to deliver its mission.

www.nonprofitrisk.org

Any questions?

Carlye Christianson
Senior Counsel and Director of
Special Projects

carlye@nonprofitrisk.org
202 785 3891
