

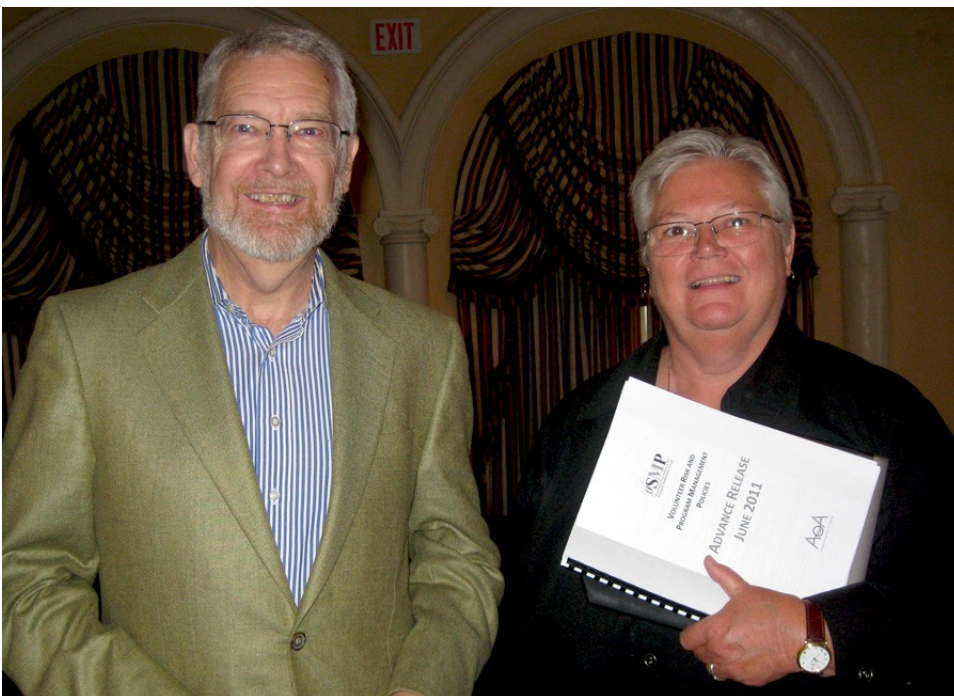
Getting Started: Working with Volunteer Host Organizations to Implement Risk and Volunteer Management Policies

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At the SMP national conference in Washington, D.C., this year, Linda Graff and Steve McCurley, consultants on the Volunteer Risk and Program Management (VRPM) committee, presented several [sessions](#) (see Wednesday, August 10, entries) about the SMP volunteer risk and program management policies that will begin to take effect this January. The consultants talked about how these new policies will help SMPs and their host organizations (partner agencies) operate the safest and most effective volunteer programs.

Conference attendees, who had a chance to preview the policies in an Advance Release version featured in a [webinar](#) on June 1, 2011, gave the new policies a warm reception. When asked at the conference about the response from SMPs to the Advance Release document, Barbara Dieker, director of the Office of Elder Rights at the U.S. Administration on Aging (AoA), said, “We’re gratified by the positive response from the SMP network to both the policies as well as the VRPM program in general. We know that the upcoming implementation effort will require important changes for many SMPs, as well as staff and budget commitments. We are thrilled that SMPs have



Steve McCurley and Linda Graff at the 2011 national conference with the Advance Release document

voiced their willingness to use this opportunity to put into place volunteer programs with strong management systems that will place them among the best in the nation.”

The consultants stressed in their presentations the critical importance of working closely with their partners – volunteer host organizations – to implement the VRPM policies. Because many, if not most, of the policies will apply equally to SMP volunteer involvement coordinated by host organizations, Linda and Steve emphasized the need for SMPs to work early and closely with their

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partners on the adoption of the new policies.

Sentinel staff caught up with Linda Graff (LG) and Steve McCurley (SM) after the national conference to ask how SMPs can ensure that the new policies are implemented equally well among their volunteer host organizations.

Sentinel: *Let's start at the beginning. Why do SMP policies have to be adopted in host organizations?*

LG: The Center did a study last January on the nature and extent of partnerships through which SMPs deliver their services. We reported some of the pivotal results in our Vision Guide [webinar](#) as we launched the VRPM project this past February. We knew that many SMPs worked with volunteer host organizations, but we were quite surprised at how pervasive that delivery model actually is. For example, over 90 percent of all SMPs have partnership arrangements with volunteer host organizations.

Sentinel: *Do we know how many SMP volunteers actually serve under the auspices of those third-party partner agencies?*

SM: Yes. We asked about that in the survey and found:

- Twenty-four percent of SMPs said they had 10 to 25 volunteers working through third-party agencies
- An additional 16 percent said they had 25 to 50 volunteers working through third-party agencies
- Almost a third of SMPs said they had 50 or more SMP volunteers working through these third-party organizations

We also found that nearly 46 percent of SMPs have all of their volunteers serving under the auspices of a volunteer host organization. Going a step further, the data revealed that 73 percent of all SMPs have 50 percent or more of their volunteer workforce working under the auspices of third-party host organizations.

Clearly the SMP volunteer workforce is widely decentralized, with many, if not most, SMP volunteers working under the auspices of third-party volunteer host organizations. This is an aspect of the SMP program that makes it different from other programs and that poses some extra difficulty in creating an effective and safe volunteer management system.

Sentinel: *So how does this information connect with the policy initiative?*

SM: Quite early on the project steering committee took the position that if volunteers are clearly doing SMP work, then we have some responsibility to ensure that that work is done well and safely. If we are going to introduce policies to guide the work of SMP volunteers, then those policies have to extend to all SMP volunteers. That means our policies must apply to SMP volunteers no matter how they are recruited or coordinated. It also means that SMPs will have to work quite closely with their volunteer host organizations to give notice that the SMP policies are coming their way beginning in January and of their need to ensure that their own volunteer risk and program management policies align with the new SMP policies.

Sentinel: *This represents a whole other layer of work, doesn't it?*

LG: Unfortunately, it does. We've given a lot of thought to the implications and complexities of this layer of policy implementation. Frankly, we wish we didn't have to deal with this because the volunteer risk and program management policy initiative is big enough without it. But not confronting the reality head-on to ensure that the policies apply consistently to all SMP volunteers would not only be irresponsible, it could actually increase the risk exposure to volunteers in "non-compliant," if I can use that term, volunteer host organizations. By failing to screen applicants for volunteer positions properly, for example, non-compliant host organizations increase their risk *and* liability exposure. Simply put, it was an issue we just couldn't dodge.

Sentinel: *So what can SMP organizations do right now?*

LG: Well, I said at the national conference that SMPs don't *have* to do anything about this initiative until January 2012, when the first set of policies begins to be formally introduced. And that is true. However, given the size of the initiative and the complexities of working with host organizations, we strongly recommend that SMPs start the conversations with their respective host organizations just as soon as possible.

It is likely that some volunteer host organizations will be taken aback by the extension of these policies to what many may consider "their" volunteers. If the volunteer host organizations that work with SMPs are typical of many volunteer-based organizations, many of them will have very few policies in place pertaining to volunteer involvement.

Sentinel: *Why do you say that?*

LG: Well, I don't mean in any way to be offensive, but after more than 35 years working directly with coordinators of volunteers from the broadest range of non-profit organizations, and after doing dozens and dozens of workshops specifically on policy development and risk management, I know from first-hand experience that policy development to guide volunteer work has not been a priority for many non-profit and public organizations.

SM: Like Linda, I've had the same experience. Policy development is something that many volunteer-based organizations still need to do a lot of work on. They usually only do this work after there has been a disaster or a serious incident, and the good thing about the current situation is that the SMP program has chosen to act in advance of any problem, not as a reaction to one.

Sentinel: *So this initiative will mean work for the volunteer host organizations, too. Is that right?*

SM: Yes. That's the bad news. The good news is that more and more organizations are becoming aware of both the risks and liabilities they take on when they recruit and place volunteers. They're just not sure what to do about it, or feel so overwhelmed or scared by all of it that they kind of bury their heads in the sand. So on the positive side, the considerable work we have done to develop policies for SMP-related volunteers will be a giant gift to host organizations that will save many of them a heap of work. The policies we have created could apply to volunteers in

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many settings, so volunteer host organizations can apply them to all of their volunteers, not just the ones doing SMP work. It is also possible that this will not come as a surprise to them. In fact, chances are good that some volunteer host organizations have already undertaken their own measures to safeguard volunteers, which will make the work of the SMP much easier.

Sentinel: *What might SMPs do to start this process?*

LG: Well, the first thing is to notify the volunteer host organizations that the policies are coming their way. We suggest that this be done face-to-face as much as possible. Contact the partners. Ask for a face-to-face meeting. Give them a heads-up about what the meeting is about. The SMP can prepare for that conversation by jotting down a list of the advantages that the policies will generate, such as safer volunteer involvement, increased safety and security for beneficiaries, reduced risk and liability for the volunteer host organization and, perhaps most important, more effective, well-coordinated volunteer work.

Let's also remember that volunteers increasingly expect their organizations to have their acts together. Volunteers appreciate a well-run program that looks out for their safety and well-being. That builds a program that is easier to recruit to and more satisfying for volunteers.

SM: It is important to point out that many might think that this increase in "bureaucracy" will chase volunteers away. As we often say, exactly the opposite has turned out to be true in the thousands of non-profit organizations that have updated and increased their standards of volunteer program management – that is, when presented well to volunteers in a positive and supportive light (rather than begrudgingly or reluctantly), volunteers realize that policy guidance is a good thing both for the program and themselves. Some of the volunteers who already are involved with a number of local organizations will recognize these measures as things they are already accustomed to.

Sentinel: *So start the conversations with host organizations. What else?*

LG: Think about the process. In the same way that we at the VRPM project have taken lots of time to introduce the concept and practice of risk and volunteer program management throughout the SMP program, SMPs might want to follow suit with their volunteer host organizations. Don't hit them with all 170-plus policies at once! Be sure they understand the rationale and value of the policies. Be sure to let them know that we can supply all kinds of informational and practical tools to support their work. For example, we will be supplying a large volume of forms, templates, worksheets, backgrounders and so on to accompany the policies. We are preparing implementation guides, much of which will apply equally to the host organizations.

SM: The other thing to give host organizations an early heads-up about has to do with their own internal approval process. In many organizations, policies need supervisory or governance approval. So host organizations may need to take these policies to their own management or boards for approval. That may take some time, depending on the size and complexity of the organization, so the sooner they know what's coming, the earlier they can start that process.

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Sentinel: *Any closing thoughts?*

SM: SMPs know that we are working on implementation guides to help them enact the VRPM policies. There will be more detailed help in the guides about working with volunteer host organizations, so stay tuned for more information coming soon. 🍯