



MEMORANDUM

To: Deans, Directors and Department Chairs

From: Seth Pollack, Director, Service Learning Institute

**Re: 2003-05 Plan for Managing Risk in Service Learning at CSU Monterey Bay
Revision 8-26-04**

Overview

In fall 2002, after an extensive research process, the CSU Chancellor's office published a manual of guidelines for *Best Practices for Managing Risk in Service Learning*. The guidelines were developed in response to questions raised by service learning directors, faculty members, and risk management officers from across the system regarding possible risks and liability issues in service learning placements.

During summer 2003, Directors and staff of the CSU Monterey Bay Service Learning Institute (SLI) and Business and Support Services Department began meeting to review the proposed risk management policies and procedures and to develop CSUMB's campus-wide risk management plan. The group selected key processes and tools that are recommended in the CSU *Best Practices for Managing Risk in Service Learning* manual, and adapted them to fit the structure of service learning at CSUMB. Finally, the SLI Director and staff met with Deans in August to review the plan and discuss a system for collection and storage of the various forms.

I Risk Management Best Practices

The following CSUMB Risk Management principles of best practice have been developed to create service learning experiences that adhere to the guiding principles provided in the CSU *Best Practices for Managing Risk in Service Learning* manual:

A. *We will develop a formal agreement between CSUMB and each community partner to clarify the responsibilities of all parties.*

The community-based organization and CSUMB must enter into a formal agreement by signing the *University-Agency Agreement for Placement of Students* (Form 200 including General Provisions). This agreement specifies expectations for each party, and formally indicates how issues of liability and worker's compensation will be handled. The Director of Business and Support Services, the Director of the Service Learning Institute and by the CBO will sign all *University-Agency Agreements for Placement of Students*. The agreement must be renewed every three (3) years.

Starting January 2004, the SLI will require *University-Agency Agreements for Placement of Students* to be in place prior to placing students with any **new** partners. Students may be placed with existing **active** community partners while the SLI pursues *University-Agency Agreements for Placement of Students* with our active partners over the next two years.

B. We will conduct a site visit in conjunction with the formal agreement.

A CSUMB staff or faculty member will visit every active¹ community-based organization and complete a *Community Site Visit Checklist* at least once every three years. The *Community Site Visit Checklist* is a tool for assessing the requirements, risks and basic safety factors of a site. This *Checklist* must be signed by the CSUMB interviewer and the organization representative and kept on file at the SLI. In most cases SLI staff will make the site visit, however, a faculty member may complete the *Checklist* during an initial visit to a new community partner.

Prospective community partners, who are hosting **distance learners** and are not located in the tri-county Monterey Bay area, must complete and send a *Community Site Visit Checklist* to the Service Learning Institute **prior** to student placement.

C. We will inform students of the risks associated with each site prior to placement.

Using information collected in the *Community Site Visit Checklist*, and from local newspapers, the SLI will develop a *Health & Safety Profile (H&S Profile)* for each community partner organization. The Health & Safety profile will identify risks associated with specific tasks and work sites, and will be integrated into the on-line “Organization Profile” on the Service Learning Institute Website. Students will acknowledge that they have reviewed the *H&S Profile* and are familiar with the risks associated with their service sites by signing a *Learning Agreement*.

SLI has also added separate *Guidelines for Reducing Risk in Service Learning* for faculty, students and community partners to the Service Learning Institute's website. These guidelines contain lists of “Do’s” and “Don’ts” for each group.

D. Every service learning student must complete a Learning Agreement.

All students are required to complete a *Learning Agreement*. The *Learning Agreement* is the official document describing the students' specific responsibilities at their service learning site. The student, the faculty person, and the site supervisor must sign the *Learning Agreement*. Faculty members are to keep the *Learning Agreement* until the end of the semester at which time they are given to the Academic Department for storage. The Learning Agreements must be kept on file by the Academic Department for three (3) years.

¹ A Community partner organization is considered active if it has hosted service learners in the past or current Academic year.

E. Every student must document his or her service time and activities performed in the community.

All students must maintain an *Activity and Time Log* during their service assignment. This form documents the dates and hours a student worked at a site and the activities the student performed. The *Activity and Time Log* must be signed twice per semester by the site supervisor and student, and returned to the faculty for signature. It is filed with the Student's Learning Agreement by the faculty and returned to the Academic Department, where it shall be retained for three (3) years.

II Implementation Plan

The Service Learning Institute began phasing in the new risk management systems beginning in the Fall 2003 semester. The work will continue until the new procedures are fully implemented. The Implementation Plan identifies describes the processes and goals that the Service Learning Institute will pursue.

A. Training and Notifications

1. For Faculty

SLI developed and presented four workshops for faculty and staff on August 21 and August 22, 2003. Faculty and staff learned about new CSU requirements for managing risks in service learning, and faculty's responsibility regarding personal and institutional liability. Subsequent faculty trainings will be offered twice a year at the beginning of each spring and fall semester.

During September 2003, service learning staff also presented risk management procedures to faculty in individual and departmental faculty meetings to reach those faculty who did not attend one of the risk management workshops. Every effort will be made during the Fall 2003 semester to ensure that all departments are aware of the new Risk Management Process.

2. For Community Partners

SLI staff presented an overview of risk management procedures at the fall meeting of the after *After School Action Team* on August 13, 2003, and at the *Community Partner Orientation* on September 4, 2003. Subsequent risk management trainings for community partners will be scheduled twice a year at the start of the spring and fall semesters.

The SLI will also mail out notification of new risk management procedures to active community partners and organizations identified as "high-risk" by SLI staff in November 2003 and February 2004.

3. For Service Learning Student Leaders

The SLI Associate Director provided an overview of new risk management procedures to 20-student leaders on September 3, 2003. Such training will become a regular part

of the Summer of Service Leadership Academy (SoSLA) for students, held in July of each year.

4. For Service Learning Students

New risk management procedures and forms are described in the on-line Student Guide to Service Learning and presented to students in class by all faculty teaching service learning courses.

B. Developing Formal “University-Agency Agreements for Placement of Students”

With over 229 active community partners, and some 650 community based organizations in our service learning database, we anticipate the process of visiting sites, developing *Health & Safety Profiles* and signing formal *University-Agency Agreements for Placement of Students* with each organization to take at least three years to accomplish. Nonetheless, we will begin immediately to develop formal agreements with organizations identified as “high risk” by staff and with those active partners that receive the bulk of our service learning students.

Also, beginning February 2004, community-based organizations that are using service learners for the first time will be required to sign a *University-Agency Agreement for Placement of Students* before the SLI will allow students to register for service placements at their sites.

The annual process for pursuing *University-Agency Agreements for Placement of Students* will be as follows:

1. SLI notifies target organizations of the new risk management requirements in a mass mailing. (*November 2003 and February 2004*)
2. Coordinator of Community Partnerships receives Site Visit Checklists from target organizations via e-mail or on-line receipt. (*November 2003 and February 2004*)
3. Follow up with site visits by Coordinator of Community Partnerships, staff and faculty. ***Monthly - Continuous***
4. SLI Information Specialists posts Health & Safety Profiles for each target community-based organization on the Service Learning Institute Website. ***Monthly - Continuous***
5. SLI staff initiate and complete *University-Agency Agreements for Placement of Students* with target partners

B. Specific Implementation Goals

We have attached a list of community partners who are currently active. We have given “high-risk” organizations and those active partners that receive the bulk of our service learners priority status and scheduled them for completion during year one of this effort.

With our current level of staffing we will attempt to achieve the following work goals:

1. Year One - September 2003 - May 2004

- a. Community Site Visit Checklists:
Complete 3 per week for 10 months = 120 in Year One
- b. Health & Safety Profiles:
Complete 3 per week for 10 months = 120 in Year One
- c. University-Agency Agreements for Placement of Students:
Complete 4 per month for 10 months = 40 in Year One

2. Year Two - August 2004 - May 2005

- a. Community Site Visit Checklists:
Complete 3 per week for 10 months = 120 in Year Two
- b. Health & Safety Profiles:
Complete 3 per week for 10 months = 120 in Year Two
- c. University-Agency Agreements for Placement of Students:
Complete 8 per month for 10 months = 80 in Year Two

3. Year Three - August 2005 - May 2006

- a. Community Site Visit Checklists: (Completed in Year Two)
- b. Health & Safety Profiles: (Completed in Year Two)
- c. University-Agency Agreements for Placement of Students:
Complete 10 per month for 10 months = 100 in Year Three

C. Conclusion

This **2003-05 Plan for Managing Risk in Service Learning at CSU Monterey Bay** represents significant new workload responsibilities for the Service Learning Institute. As the system is new, we will closely monitor the time commitment required for implementation of this important element of University-Community partnership work. We thank you for your collaboration in the implementation of this initiative. If you have any questions regarding the plan, please contact Brenda Shinault at 582-5175.