



## **Workplace Policies and your Organization: How Policies Support or Contradict Core Values**

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### **Webinar Captioning Transcript**

*Presented by Futures Without Violence*

Hi everyone welcome my name is Patricia Gotera, with the Family Court justice, Family Court Judges, before we begin I would like to provide you with an overview how you can act, react with facilitators. Feel free to answer here for any questions, you will also find a PDF copy in the materials box below as well as related material to today's event click the fat -- Final download button Web Link is down below you will be able to complete an evaluation it will pop up automatically on your screen if you're having any technical or audio issues please let me know in the chat box and I will let you know directly. I will turn it over to our presenters today and we can get started.

>> Thank you Patricia pics -- Good afternoon. Welcome to the infinite station -- Jennifer white the program director joining today my partners Neelam Patel, and Amy Sanchez, Break the Cycle and Monica Arenas from Futures Without Violence. We wish to think not only in this project but organizations all around the country supporting survivors, violence against women, and we are very happy that Neelam Patel is here today. Objectives today as a result of this webinar you will be able to identify elements of your infrastructure that you may enhance or improve consider leadership strategies that will support staff and their work utilized tools to advance your infrastructure and capacity. So we would like to start out the webinar by getting a feel by who is in the virtual room we have a Poll here, the question is, what is your role at your organization? We have Executive Director, program staff, board member. Other, or no vote. If you wish to remain secretive about your role. Okay. It looks like we have a good mix of executive director and program staff others, general counsel, -- As her role. Great. Let's see for a second Poll, I am just interested in knowing how many employees are in your organization? There are some folks that are typing in their role in their organization as well as director and folks all are volunteers in the organization. Thanks for sharing that. Okay. So it looks like we are pretty well spread out with the largest number being more than 40. Then spread out with 5, 6, and then 10, and so on. Thank you for participating in our poll. We just like to get an idea of who we are visiting with on the Webcast. So with that I will turn it over to Neelam, to talk about the background on SOS Institute.

>> Thanks Jennifer. Hello everyone my name is Neelam Patel, the technical assistance team lead. I am excited to provide you with an overview about domestic violence -- And the women's Institute, SOS Institute for short, offers interactive training partner organizations, and potential grantees focus on enhancing their programming organizational infrastructure capacity this project started 2010. The Institute has a national focus on targeting community-based organizations that forms all forearms of domestic violence, the overarching goal of SOS Institute to support to workshops and Webcast tools

and resources that enhance their skill and improve their knowledge to sustain their organization. As I stated in the previous slide. We provide a variety of services, the staff and consultants for the Institute provide one-on-one technical assistance using a variety of technology methods, to answer questions about organizational issues as well as feedback on policies and procedures sustainability and development. I recommend that you visit the website under the leadership development, on the SOS Institute page, covering a wide range of topics including Succession Planning, workplace policy developing nonprofit digital strategies. You will also find on the page organizational toolkit to resources. Finally the next in person SOS Institute will be held May 15-17, 2019 in Minneapolis, you can find this information on the website, to apply, thank you and I will turn it back to Jennifer.

>> Thank you so much Neelam I will actually turn it over to Amy to lead us through the beginning slides.

>> Thank you Jen. Welcome everyone we thought it would be good today to give you a little example of the work done in the SOS Institute, the slideshow is all of the different areas. That we think are important for organizational success. You will see in the middle mission and core values. At this Institute we have the philosophy the mission and core values of your organization should drive all of your organizational decisions, right? That can be in any of these areas from who is on your Board of Directors to your leadership to development physically, every single one of those circles throughout the SOS Institute we do a deep dive into those areas so that people can take actionable steps back to their organization and realign their core values in all that you do. Today in a little while I will go a little deeper into both leadership, and staff development and retention pieces, just to give you a small sample of some of the things that we do in SOS Institute. Going around the circle. If you look at the healthy organizational policies in the culture aligning with your values, right? Really looking at value such as for example, inclusivity, sensitivity, and looking at how your policies fit within that, an example. I like to use in that area, say you have a value of inclusivity. When you look at your employment policy for example. How are you getting paid time off? Traditionally many organizations would like to give a religious holiday for example Christmas Day. If your organizational value is inclusivity, then you can have a floating religious holiday right, depending upon their faith. People can choose a religious holiday that like to kick off one simple example of value within your organization. Driving some of the organizational policies that you have. When we look at the program looking at planning and short-term in the short-term and long-term. We go through strategic planning which all of you know is usually 3 to 5 years. Looking at how your programs and your infrastructure and your operations match up to the future goals you want to make. Programmatic planning. We look at annual planning. Object in activities all that fun stuff. Timelines. Staffing. And then individual work planning as well. Another one I wanted to highlight is the governing body and the board. We go through engaging directors, skill sets different representations from different communities. All within lining up with your mission and core values. Obviously a really important piece. We go through seeing board member job descriptions. Give and get policy. 100% board giving, all of those pieces. So we thought it would be interesting that we have a brief overview of all the different elements that we talk about. We would like to have you take this poll here, this would help me and further the part of the webinar and in general we would like to hear from the programs to hear some of the challenges and what those are. Mission and core values are aligned. Issues around policies around the organizational culture, leadership and human resources, staff retention and communications. Internal and external planning. Succession planning. Governing board and body, organizational changes that can be staff changes. Philosophy changes. Or other. If you click in the other, we would love for you to write in the chat box exactly what you are thinking. I will give you a second to do that. Okay looks like leadership and staff retention, big issue communication as well. Okay Monica did you want to take this Next Slide?

>> Sure thank you for sharing. I think also this is Monica from Futures Without Violence, and other things organizations shared in the registration, again staff supervision. Leadership power-sharing. Organizational culture internal collaboration practice data management and financial resources. Other things that registrants highlighted as some needs. Now we would like to ask you to share what information and/or tools that you rely on to help you with your organizational challenges for support. In the chat if you can please write down what resources or tools that you use for support. I see consultants. Appreciative inquiry counselors and advocates to support each other. Again consultation, state coalitions that support trainings, board. Network of other executive directors. Coalition.

>> Resources popped up as well. Yes Jen do you want to continue with that?

>> No I was just helping.

>> Staff file union grievances if there is a union, crucial conversations. That is great. Nonprofit state wide resources. You all are sending a lot of great ideas on how to get support with some of the organizational challenges that might come up. Retreats that is a great idea. Yes collaboration with coworkers. That is a big thing in terms of organizations and what they are asking in terms of strategies with collaboration with others within the court and the organization, having crucial conversations again communication is very important. The strategic planning. Support firm cultural organizations and discussions. This the reason why we are asking as well, for you to gather ideas from others. Maybe some of you are sharing things others have not thought about. These are things that you can also think of in terms of resources that may be helpful for you in your community. Within your organization of strategies. Thank you for sharing. Now we will go into another chat. That Jen will lead.

>> We will talk about leadership which is one of the areas that many of you noted could be a point where there are some challenges within the organization. Where folks might need some additional support. We will asked the question. You see the first question on the slide. If you can use the chat box to answer. The first one. Think of the best manager you have had. What qualities did this person possess that made you feel this way as a manager? Kate is writing collaborative thinking appreciative Jen -- I see showing compassion. -- Approachable again, flexible, transparent. Nonjudgmental. Teamwork communication. Somebody who is a motivator. Provides holding environment, for me to take risks is a good one. Solution focused. Open to ideas. This idea around really have an investment in your team to succeed. That is a great one too, providing access. Not sort of holding back information but providing access to the clients, so that everybody can work together. Someone who is inspiring, ethical, and accountable. These are great qualities. Dedicated and flexible. Looks to understand open-door policy. Encouraging. Investment and professional development growth is a good one. Opening to using multiple strategies committed to the client direct services, impact collaboration and other service providers. Still a family-friendly policy that Amy touched on a little bit when we were showing that graphic. And those types of policies you may have under core values. Flex plan. These are all really great. Great contributions thank you. Transparent. Everyone sees everyone as a part of the team consistent and knowledgeable. All right. The second part of the question is thinking about the best leader you have known in the place you have worked. That person can be, an official leader, or an executive title or and un-official leader. Someone you have unofficial leaders you have worked with not necessarily having the right title but they were a legal leader. What qualities to that person possess? Folks are writing inspirational, clear vision, fairness. Compassionate. How to connect with everyone on a respectful fair level. Vision and follow-through. Whatever it takes attitude. Calm under pressure. Active listening, open to learning, encouraging, someone who is a visionary. Someone who believes in the employees. Dependable. Willing to pass knowledge on. Clear visions. That word has come up a few times for the second question. Which is

really interesting. Encouraging compassionate. Ability to see things from different perspective lives. Focused. Big general visions and more steps to get there. Bigger picture. Can break down small portions to communicate in a clear way. Big picture. Someone who was transparent, great sense of humor always helps doesn't? A sense of humor is a real asset. Want the employees or the team to succeed. These are wonderful. Part of why we are having this conversation for freethinking qualities. These conversations that are supportive. Really helping you thrive as an employee. Whether someone directly supervising you or maybe someone you work with as a peer, as a jumping off point a little discussion on different types of leadership. This is something that we spend a good that we spend a good deal of time on coming up this May, we will have a little bit more of a conversation and Amy will lead that for us.

>> Great thanks Jen. Let's see here. One of the things, the format of the webinar you could see we are asking for all of your thinking, Monica references earlier, one of these institutes and a shameless plug for you to consider and considering applying. 2 1/2 days together. The faculty has the philosophy. That we all have something to contribute. By sharing our resources and resources, experiences good and bad, everyone in the room learns, I would say most of the work of the Institute and activities small table discussions. It is a great dynamic space right? So the people aren't sitting up in front of the room to lecture us, we believe the learning is in the doing, one of the reasons why you can fill in the format of the webinar, and one thing we'd like to talk about briefly today. The types of leaderships. We will go over today the more traditional leadership. Really again one of the things that is SOS Institute a deeper dive into different styles and kinds of leaderships we would notice in the field I would say past five years or so, organizations are trying different types of leadership organizations, organizations are doing more shared leadership structures, in a former way, maybe having to Executive Director others, or leadership direct others, in charge of different part here maybe different types of the direction, different types of models that seem to fit well, in the core values. We will talk more about a more traditional model of leadership. Getting leadership skills around that. Really in the traditional model the leader the player dish -- The traditional leader, there priority is to lay out this in the division my perspective in order for it to be having the organization and staff working towards the same goal the vision has to be created together. Many organizations done in a strategic planning process. Many organizations the vision is created by the board and the staff together. Another kind of formal leadership structure is having a mentor or sometimes we call that person a coach. May be a distinction between a mentor or coach. The mentor shares with their mentee information about themselves, things that they have along the way providing emotional support and role modeling to the mentee . One piece I wanted to mention about mentoring specifically on the SOS, Futures Without Violence, the section on that we did a whole webinar on mentoring, if that is something that you are interested in listening to that webinar, I highly suggest it. When we look at a traditional structure with supervisors and managers, supervisors communicating organizational need overseeing performance evaluation things like that, support and looking for different professional development needs that the team has. Looking at if there are issues between teams in different staff members. Really looking to help clarify roles and responsibilities, and troubleshoot if there are problems. The manager role is much more around working with individual members of the team building strength and capacity as team members. Making a traditional distinction between supervisors and managers. I think the really important piece that is not on the slide that I want to highlight. Is no matter what the different roles. We all have different roles in the room, in our organizations, one of the common threads throughout there needs to be places within the organization that individuals and teams can show up to show leadership. Take leadership and successfully implement projects. The important no matter what role you have within your organization, the mission and the core values need to be able to be expensive enough to drive individual and team leadership. That is really

important piece for the success and the longevity of the organization. So that all the leadership. I don't know if some of you have worked in places where you have a professional executive director, maybe founder of the organization whatnot. Once that person retires or leaves. That leadership piece in the community is lost. One of the key pieces around sustainability, is to build authentic ways and ability within the organization to take leadership no matter what role they have. The other part of leadership. In a traditional sense that we wanted to highlight is situational leadership. Basically it is what it says. Supervision based on a situation. Right? The thinking behind this area. There is really no single best way of doing something. Supervising someone. It really depends on the tasks that people are asked to do. And also it depends upon the employee that you are supervising. What it means each employee. Has a different supervision need. Right? For many years a long time within the field we thought employees molding their needs in a way that supervisors, supervise, what we are encouraging you to think about. Is on the supervisor to build up. Someone mentioned it in the chat. The toolbox. They have different roles depending on the needs that the staff has for supervision. Like it says here. Successful leaders adapt their styles to the confidence of the individual of the group. That is a real key piece. Right? In successful leadership. Here is a diagram I want to walk through a little bit to give examples a concrete example of situational leadership. There are four different ways that you can look at situational leadership, directing, supporting, coaching and delegating. I will start with S1, hopefully not too confusing relevant to most of us on the webinar, applying and having staff member support, to apply in order for protection, if the staff member is going to go with the survivor to get this protection and the staff member needs the directing type of supervision. That really would be the kind of staff person that doesn't have a lot of experience getting an order of protection but gives this feeling of comfort giving the task, they need directions on how to do it. They don't need you to go with them to get the order of protection, can I tell them what they need to do and then they can take care of it there competent and that. I always say the directing section is just tell me what you want me to do and I will do it kind of thing right, someone who hasn't done it before doesn't know the task at hand but confident in the air ability to do that. The second one S2, the blue coaching section, again using the order of protection example, the staff member that you are supervising. They really don't have a lot of experience getting an order of protection and also doesn't feel very confident doesn't feel very confident about their ability to be effective when they go to court. In that case the staff member really needs coaching. The step-by-step directions on how to do it. What you need to do a, b, c, or d. Giving them constructive criticism and feedback about their role, maybe doing a role-play with the staff member. All of those things both highly direct and highly supportive. Again the kind of way I think about that and categorize that is tell me what to do and walk with me every step of the way basically that is the kind of direction and support someone who has that need for coaching. That is an example of that. S3 , supporting, and low direction. Really someone who maybe has the understanding of advocacy, and to be an advocate, for protection and is more insecure about how they would be affected in court they may need reassurance about their role, the rights of the victim, may need to -- The victim and may need to role-play, less about the do a, b, or c. -- I just need you to walk with me on this one. The final one is delegating, which is S4, the light green part of the pie, low supportive low directive behavior, someone who has the skills and the self-assurance to advocate on their own for the order of protection. That might be somebody that maybe after they go, you just want to check in with them to see how it went if they have any questions if they needed anything. You and them as well who have the knowledge to do it and to get the task at hand done. Mine at this section is I got this. For me it is really helpful. Like I said I think it's a good way to think about how you as positional leaders in your organization how you can support them in different ways this is a healthy framework to have in front of me. Again the important piece, the same staff person might need a different supervision style, if the task or the sticker stances change, this situational leadership framework. You have a different kind of tool. If you have a staff member, they may be varied, and can be very

directed. Say giving a presentation, or there is a trainer at a local school for example, and they may be at a totally different place in their professional development and confidence and may need a different kind of leadership style or supportive styles from you. It's always important to check in with your staff members about the staff member support they need from you depending upon the task at hand. So the other piece that goes along with the staff support is really looking at staff development and retention. When we talk about this. Really creating what we call in the field a trauma informed workplace. That goes back to your mission and the core values how you want to live those things out in your organization and some of the things that we know. Internal and external factors, their happiness within their job and organization. There are lots of different factors to affect it. Some of the factors to affect it here. Stress and vicarious trauma obviously. Each individual staff personal history. Stories. Types of things and types of stories they are listening to on it daily basis. How long they have been there at your organization. Always having to be empathetic, isolation. I love early on where quite a few of you actually said collaborating with coworkers talking with coworkers and I saw someone having a group of executive directors you can talk to having peer groups that you can share things with. Share success and challenges, to give feedback on, that isolation piece is really critical. In the organizations. We hear this over and over again. Some of the protective factors. -- Some of those protective factors we want to pull out, since these more and more over the years I would say going back to the leadership styles as organization start to shift a bit. Having more of a collective approach to the work. A team spirit. Creating a way where staff feel supported. Providing training, organization say it's not in their budget or we don't have the funding to do that. One of the things that we did in my organization a year ago. The staff would trade, having them write down two or three things that they wanted to teach to other staff members. This is where they have expertise. May not even be in their day to day job. Right? We have one staff member for example. Really good at making videos. So one of our staff meetings, she walks through how to make videos another one who is a design leader, we did hands-on tutorial, which is a design program on Canva. Sometimes it doesn't take a lot of money or resources. Obviously if you can do that fantastic. Sending your staff for training like SOS Institute. That is fantastic. Also innate and natural qualities that your staff have, in my experience at least people are excited and interested in sharing that with others. It can be a protective factor around staff support and leadership as you continue to grow. Balancing workload. Sometimes that's easier said than done. I think that is real in our field striving towards that is really important. Some people love to have different kinds of tasks they do. That might be having a balanced workload. And some people might do better in an environment where they can do administrative functions in the morning and do creative functions in the afternoon. I think really working with staff to figure out how with all the responsibilities that they have being going to court, or writing a curriculum. How can they organize, so the day is balanced and that they have the excitement to do it on day in and day out. Some of those solutions can come from the staff themselves. They know how they best work. Another protective factor. Matching what we were talking about earlier. Really pushing ourselves as positional leaders. Really to try to show up in a supervisory way they need us to show up. I would encourage you to refer back once the webinar is done. Refer back to the chart. That I shared with you different situational leadership pieces. I think it is really important. At the beginning at least, a mind twitch so that we are showing up supervising staff in a way that they need it. And the final protective fact or that we want to talk about is trauma informed care. Which is work done in the field about this topic. We always put it on there because it's critically important. In order for them to have staff that aren't turning over all the time getting burnt out all the time. The protective factors, for example with trauma care is very critical. Some things on the slide that I want to talk about other ways that you can have or build a healthy work environment. One is to build really concrete strategies in your missions and your values, as a core value, is to be family centered, and family meaning whatever you wanted to mean within your organization, concrete with having a healthy work environment is building flex time for staff. Again if

you have a child for example that is sick, how does your organization respond? Could it be a flex time? Could it be having paid time off policy instead of vacation days or six days, lots of different ways. If your value is family centered, how do you put that out for a healthy work environment? Another thing I would recommend. Really having clear levels of authority and responsibility. Expectations I think couple of people had mentioned earlier in the chat some of the qualities that you like most in leaders that you have worked with. So that people can show up with good and authentic ways. At the same time if I am asked to do something. I show up 100%. My manager says that's really not what I wanted. That's for me around the manager not clear on what the expectation is or the lines of responsibility. The point here, the more clear you can be is the better. Having a clear direction. This is usually accomplished with a strategic plan or an annual planning the work planning for your team. Really so that everybody knows what their role is right? And contributing to advancing their mission. Maybe one of the things you might be interested in doing in your own organization. Especially the executive director there's I have a few on today. Really going on and sane asking people with your job, how do you best advance in this mission? It's fascinating and really inspiring for me to hear what people say. You can really tap into the motivation. And it's really important. When you verbalize things. My job whatever it is. In this organization. We advance in the mission and how powerful is that? Another thing. Not on the slide. Around protective fact there's around something I wanted to talk about today. So we have chat number 3 here. Staff development strategies exchange, some of the things that have worked for you. The first one. Supporting leadership of staff. And others. What are some of the things that you have done to support the leadership? Of your staff and others? Volunteers, volunteers of your board? If you can write some ideas in the chat, that would be fantastic.

>> Thank you Amy I would just like to highlight. We would like to make this an opportunity for peer exchange. We plan to share this strategy with you. Through a list that we will put together. In the areas that you share so that we can share with others what others are doing or that you are doing mutually. Thank you. Go here we have weekly meetings, weekly leadership meetings, etc., having a voice in hiring the director that's fantastic. Bringing back information. Right. If you go to a training, going to outside training you bring that information back to people, sharing that with interns and volunteers. Finding out what the interests are, and with projects, that is great. Staff retreats and meetings. Maladies says mentoring, providing opportunities for trainings and professional growth. Excellent. Standing staff to conferences and asking them to bring it back to staff meetings. I think that is fantastic people who really like to talk to colleagues about what they did. Especially training outside and the share their knowledge. Leadership positions are excellent. Shared board reports for managers and staff. Sharing information on staff meetings. Heading up a committee or a task force. Excellent. These are really great ideas. Keep them coming like Monica said we will share all these different ideas with all of you. That is great. That is supporting the leadership and staff, we can now transition into the place where we want you to chat. The first one supporting leadership of staff and developing skills, what are the ways that you can use to develop the skills to enhance the skills and deepen the skills that your staff has? Here we have involving them in decision-making. Setting goals and object lives. Excellent. Effective supervision. Keep them coming. Keeping staff involved in conversations and having a weekly check-in is really important there is a regular sense on a weekly basis whatever that timeframe looks like that is great. With particular types of liaisons, listening to suggestions, taking input. When people come with you with construction criticism, the way you respond, is often skills, one-on-one check-in is excellent. Mentoring staff to take on new staff, to expand services to clients, excellent. Those are all really great ideas. Brainstorming? Excellent. I think I take some of my directors to lunch and we meet over lunch fantastic all great ideas. I appreciate your participation and sharing with others what you do. This is really important. A couple of the best practices to remember that we wanted to get the highlight for you. As leaders of your

organizations, one of the most important responsibilities for us, to create where staff can thrive, right, if you are able to come to SOS Institute you will hear this over and over again. It so critical. How you live out your mission without -- Within your organization. If there is someplace in the mission statement about ending violence, those two words in the mission statement -- How can we contribute within the organization -- Day in and day out that make a difference if it's okay organizationally for me to come in and yell at staff, if we say that is okay. We are living out our mission and core values, I'm not right? It's really important that the mission drives that we do, the mission creates the right environment for your staff, our mission is to work with young people across the country, right click? A bunch of people that were working in the organization volunteering, they are not young people what is the message that we are sending? How are we living out our core values within the organization and environment? We talk about match and supervision style with employees that you have and the situation. The situations that you do. These practices that build on the strength of staff for well-being, growth and sustainability. The idea of collaboration and working together peer-to-peer work coaching, this is a way in which you can both support each other and solve so that a lot of times within the team framework some of that peer-to-peer work is fantastic. For creating and sustaining the kind of environment that you want in your organization. With that I will turn it over to Monica.

>> Thank you Amy. Thank you everyone for participating and sharing as well. I want to before I go into the strategies. I want to go back into the introduction that we provided, many of you were not present yet I believe half of the room. I want to highlight the SOS Institute or supporting organizational sustainability, a project that provides support, not just a training but also we have resources. Technical assistance support that can be available to support your infrastructure and capacity building. To improve knowledge and maintain sustainability. This is also for organizations working on domestic violence, sexual assault and stocking. -- We are able to send you emails over the phone not only just for training over the phone but resources that are available on the website. Also have conversations with you on-site support as well. Also the opportunity for you to participate in the training that we have May 15-17th which we are registering for right now. We have limited space only about 15 or 16 teams, we can provide you with support even if you are not able to attend. Now I would like to highlight in terms of the things or strategies that past participants of SOS Institute through a training as well as well as on-site support. As well as over the phone. Have benefited from. Including a lot of organizations that we have found helpful the opportunity to review the mission statement. Or have no core values. No written core values. This has been a helpful opportunity. We have now a tool that we developed to help you with that we can send to you if you are interested. To review and also develop your core values. Also as a follow-up to SOS Institute. These are some of the things that organization have done in the past or are doing now. In the organization. It is working in depth the process that includes doing environmental scan and interviews with staff members and community, other organizations that revise core values being used as decision-making reference tools or to revise organization policies, to make sure that they align with the core values including policies with working with survivors. How they support survivors. There setting within the organization. How they are set up. Being accessible to the community that they serve. Also an organization in Georgia. Creating a new program manager role previously one person was supervising everyone. They identified staff positions and changed roles based on the strengths. This was helpful to staff in enhancing communication, resolving conflicts and provided leadership opportunities. Other organizations that started coaching staff development programs and leadership developments. Staff peer mentoring procedures, to not rely on one supervisor. Clarifying roles and responsibilities. Creating staff work plans. Performance evaluations. Recognition processes, all of these have been helpful for organizations. Another organization whose executive director that is planning to retire in three years formed a succession committee that includes the staff and leadership roles and board



members as a part of the plan. They are also working on building the leadership of staff internally and within the community. They are documenting internal procedures in preparation for the transition. These are different ways that the organizations are taking steps to enhance their infrastructure. Including to decrease staff turnover. Creating self-care teams. Encouraging activities with trauma informed care. Intern enhancing, uplifting moral as well as enhancing services to the community. We have also seen aligning services to their mission and core values including improving layout of shelter for accessibility, including underserved communities, people with disabilities and LGBT communities, and recruiting new board members to meet the organization's needs assessing the board structures improving engagement and also leading trainings for the board. Many organizations actually have created this teams within the organization to focus on infrastructure in the process of what would be helpful to enhance the infrastructure and support staff. So these are some of the things working on work plans performance plans planning strategies. And other strategies or steps that the organizations have been taking. In terms of this. We have also had planning days, where Amy has visited several organizations on-site for support with strategic planning for the organization related to the SOS Institute. We developed this organizational needs assessment form that you can download in the web files on the screen organizational needs assessment form a form or a web link that is blank, you can fill out which is a web link, in the different areas, Amy reviewed at the beginning of the webinar, the chart in terms of the elements for success. For the organization. You can check to see where you are at and what resources of support would be helpful. That is next steps in terms of accessing support and letting us know what resources or support would be helpful. We also have as mentioned training in May. And also a registration link and flyer that you can download. We also have resources. Again TA assistance available. We also have upcoming webinars. Please let us know other topics that you think would be helpful for you. We also have great opportunity for leaders and executive directors that we are planning, called professional leadership advancement network. This would be an opportunity for leaders to network and develop leadership and exchange experiences. This will be open to past SOS Institute participants as well as other executive directors and leaders that have not attended the SOS Institute. This will include an in person workshop ongoing Webcast and conference calls among the participants. That is an overview of what is coming up for the SOS Institute as well as the opportunity for support. Also for that is all I have for that area. Now we can go into questions. I'm not sure if you have submitted questions? Please feel free to chat and type any questions you may have. In terms of resources I saw someone asked about how we get the tool. I'm not sure what tool you are referring to. In the evaluation you can let me know what resources, if you are asking about the tool on developing your mission and core values, yes let me know if you need it. We also have a tool that we developed together with Becky Masaki, with staff and organizational transitions, we call it transition curve we can share with you also on the website. Are there any questions that you would like to highlight? Amy did you see any questions? We can also go back to the questions of participants, the ones they send in advance, one area I would like to highlight also related to the area on financial sustainability. I know several of you asked about supporting in that area. And financial resources and management. We are not covering that. There are restrictions in that overview, not within the training at the moment. Also support in that area, if you are OVW Grantee, they are also able to support based on what they mentioned to us. Amy or Jen, do you want to add anything related to that?

>> Many have said by way of support. The financial management division within financial justice, are there specific to the financial side of the agreement. As well as a pretty comprehensive webinar that is offered through the Department of Justice, more of a virtual training not a webinar forgive me. I did this last year, myself a multipart taking quite a long time to complete is helpful in terms of understanding the complicated financial management issues that can sometimes arise with federal

grants and managing the grants -- The grants that you have. Take time it's worth it. I think you get a specific certificate at the end so that is nice.

>> Amy here, the only other piece I would add around fundamental development, one piece of organizational development, the clearer you are the easier fund development is. Like with any of the pieces, once you are clear on the mission and the core values. Everything from who you get on your Board of Directors to how you do planning. How you have your HR policies lineup and your fund development. All of this syncs together. Some of those skills even like Monica said we don't to fundraiser training within the space. Some of this is very helpful in the area of fundamental development.

>> Thank you. I don't see any questions. I would like to maybe go back to the area that participant sent in advance, that we related too, or that you have covered in terms of development and leadership development trauma informed care. We do have resources related to all of this. We can share with you. In terms of transition as well. Data management and data security, I believe there is another TA provider that has resources in that area, and we do have links and that section we can send to you. At least two people asked about that. The security as well.

>> One question I have for all of you. We probably should have done this as a poll question. If you can use the chat box. That would be helpful. I've been thinking about the field and how we are using social media. We do quite a bit in the communication of SOS, do you feel the field in general in your organization do we need more training specific training around external communication, branding, how you use this to advance your mission? I would love to see what you thought about that. I'm seeing yes. Thank you Andrea.

>> Absolutely.

>> Okay. Thank you can you specify what you mean by that another person I was talking to this morning also asked about that in terms of the different staff members who are using different strategies for different ways of communicating. I get specifics in terms of what would be helpful.

>> I can give a story while you are answering this question. At Break the Cycle we have a weekly show we call talk about it Tuesday. Young people take over our Snapchat and answer questions about healthy relationships. As a CEO one of my staff came up with the fantastic idea. Oh my gosh how do we control the message? How do we do that? Right. I was really pushed in a good way. To go back to our mission and our core values which is innovating, and helping young people with tools, couple years ago we started, and we thought about using Snapchat as a way to reach young people. I wanted to use that as an example something in the thousand years I would've never thought of, we have young people with whom although all over the country they do when example. I see here. I see currently working with students on branding. Excellent. Excellent information on how to use social media. I would love to see training in those areas. Great. If there are suggestions as a team please feel free to email Monica email on the slide in front of you now. We would love to hear your information and your ideas. Your suggestions. Any other questions about any other pieces we talk about? Or other trends you have seen within your organizations or organizations that are working in that field, maybe opportunities where they are or needs that we all have?

>> One area that has come up a lot has been on transition and succession planning. That is an area we did a webinar on the Succession Planning. We may be doing another Part 2 as well more in depth. Please look for that. We will send you the invitation. You will all get a link to the recorded webinar and all of the resources and PowerPoint as well. In the next few days. Also please fill out the organizational needs assessment, we think it will be helpful for you. Also let us know any resources

that would be helpful to you. Also through the evaluation again, you can request more information. A certificate as well as letting us know what other webinar topics would be helpful for you.

>> Thank you all so much for participating today and your great suggestions and engaging, and sharing on the chat with us. I would like to think also. Neelam, Monica, and Amy leading all of the great work we do at the SOS Institute please continue to visit with us. We look forward to working with all of you thank you so much for your time today.

>> Thank you everyone. Please let us know, contact us and fill out the evaluation. Have a great rest of the week thank you for taking the time in participating. Also thank you to the National Council.