

Living Your Policy: Sharing Your Policies & Training Your Team

This resource was created following a SRE session with [Sacred Spaces](#) on the [Keilim Policy Toolkit - Module 6](#): Living Your Policy, led by Ameer Wurzburg and Stephanie Gray on March 14, 2023.

Introduction

According to SRE Network's [2022 Standards Self-Assessment Report](#), member organizations have the most room to improve in 1) providing harassment prevention training to their teams and 2) communicating policies and procedures to staff on a regular basis. **This resource helps you communicate your policies and train your team.**

Part I. Sharing Your Policies

We need to do the work of making our policies relevant to the day-to-day operations of how we run our organizations. This includes sharing our policy with our communities and adapting and updating it as things change.

Considerations for sharing your policy include asking the following questions:

A. When are we sharing our policy?

The timing needs to include [regular intervals](#) for sharing or publicizing your policy so that people know when it will be shared.

It is important to remember to share your policies with those new to your organization as part of the onboarding process and welcome packet, especially if they enter the organization outside of the designated time for policy sharing. Also consider how you will share your policy with new members in synagogues, volunteers, and others.

B. How are we sharing our policy?

Distribution models can be:

- **Formal** - You may have a hard copy in your front office or other places so people can easily access and review your policy. You may want to include an executive summary with the policy or an abridged version.
- **Formal and informal education** - Activities such as skill building, training, visual summaries, and posting signs around the building with a QR code that accesses the full policy are all good ideas. You can be creative about your distribution model such as through creating short YouTube videos for each section of the policy which explains why it was created, what it means, and how to engage with it.

- **Discussion based** - Conduct focus groups or community sessions where people can discuss the policy and ask questions.
- **Grounded in Jewish ideas** - Ground your distribution model in Jewish values, such as through a text-based session or session tied to the weekly Torah portion that connects to a section of your policy. (See [Sacred Spaces' Jewish Ethics Study Guide](#) for examples.)
- **Other ideas to consider** - One organization has a Jewish value or term tied to different parts of their building that are linked to the values in their policies. Other examples of policy distribution include speaking about policies in a sermon, policies in onboarding and in annual retreat registration, publicizing them yearly to the wider community, and reviewing policies in leadership meetings.

C. With whom are we sharing our policy?

- **Consider your policy stakeholders, whether they all need the full policy to be shared with them, and whether different stakeholders require different formats of the policy.**
- The people who will be most impacted by your policy are the ones who should be reading it. Staff, boards, and members are important stakeholders.
- Try to create abridged or accessible versions on sections that are most relevant to those who don't need to review the full policy. Abridged versions of your policy may work well for volunteers. See the Keilim Toolkit for sample language for visitors and adapt it for your organization or tailor it for your events such as retreats or conferences.
- Make sure your policy is accessible and readable for all of the different groups you're working with. Creating a policy is about hearing from all parts of a community that it will impact.
- Many organizations create **affirmation statements**, for example for parents or volunteers. These demonstrate that your organization is committed to sharing its policy as well as holding people accountable for reading and upholding it. Affirmations should be part of your policy (see this [draft policy language](#) which ties many of the above points together).
- It is up to you to decide who may most benefit from making sure they have read your policy and affirmed that they have done so. When crafting an affirmation statement, use language that reflects the kind of culture change you are hoping to create. See [Keilim's sample affirmation statement and tracking checklist for affirmation](#).

Part II - Education and Training

When thinking about education and training around violence prevention work, organizational leaders need to zoom out and have the long term in mind because this work takes time and effort.

The research on training tells us that it is often not effective for behavior change; it often doesn't address inequalities and power dynamics; and while it can increase knowledge and reporting, it does not have a significant impact on attitudes on its own. Therefore, education and training should be part of a larger education **strategy** that includes addressing the culture of an organization.

- **Why do we need an education strategy?** You need to create an educational plan because piecemeal efforts are not effective. A holistic approach is needed that is connected to an organization's values and culture. It shows your dedication to staff safety, well-being and equity and that you recognize that you can't do it all at once. A strategy helps us approach education, training, and our work with a structure.
- **How we build an organizational culture of learning means: Building an education strategy, building a timeframe, and building a budget.** Building a strategy includes:
 - Codifying it and having it be part of your policy.
 - Being strategic about your education and training.
 - Include a line item in your budget dedicated to resources and funds around education and learning demonstrates that you value learning and expertise.
 - Choose training times that are accessible for everyone and ensure they are present and not exempt.
- **Who is learning?** Remember that leadership is not exempt from learning and some people may need additional training related to their unique roles.
- **What are they learning?** Think about your scope of learning, prioritizing topics, assessing the learning, and involving staff in these decisions.
 - Minimum requirements include the policy itself, what it covers, where to find it, how to report. The minimum requirement may vary by state law.
 - Going beyond minimum requirements includes addressing and discussing root causes, looking at organizational culture, and building skills to recognize and interrupt harm.
- **When are they learning?** Consider timing, scheduling, and follow-up learning opportunities. Education and learning opportunities around prevention and response should be part of your policies. Make sure the times are accessible.
- **How can we teach and learn effectively?** Use effective strategies for learning and training.

Effective Strategies for Education and Training

Strategy 1: Skill-building is a training technique that provides specific and clear guidance on how to do something, as well as opportunities to practice and receive feedback. It goes beyond simply telling people what not to do or even what to do. When designing a training, think about how to best integrate skill building. Training offers the content material, and skill building offers a chance to apply what they learned, for example through role playing or case studies.

Strategy 2: Diversify your learning opportunities. Not everything needs to result in training. Training is about building knowledge and skills. Sometimes, other ways of communicating necessary information or providing knowledge may be stronger. When you want to provide information or teach about a topic, ask whether it needs to be a training and how to maximize your time together.

When something arises in the workplace, ask yourself:

- *What is the issue, what will address it, and what is the right approach?*
- Training is not always the right approach to address every issue. Examples of [educational or learning opportunities that are not trainings](#) include:
 - Coaching, supervision, mentoring, watching videos, reading, learning circles, 1:1 meetings with supervisors, experiential learning opportunities, fishbowls, chevruta (1-1 learning), infographics, peer groups, theater, art, shul sermons, etc,

Strategy 3: Seek continued engagement. Ensure that the training you provide is **not a one-off opportunity**. Build in follow up learnings from your training, such as setting aside time at staff meetings to discuss the training or related readings and articles. It is important to think through what the follow up might be as you design the training.

Strategy 4: Choose the right trainer. A good trainer makes a world of difference in terms of effectiveness. Use [this guide](#) when looking for a trainer, and make sure to choose the right trainer for the right topic:

- Who uses evidence-based materials that are grounded in the experiences of people who experienced harm;
- Who follows principles of effective adult learning;
- Who uses a holistic approach for pre and post training engagement and evaluation.

Strategy 5: Include interactive, engaging, and varied teaching methods. This makes the training more applicable to more people. Think about adult learning practices, relevant examples that are tailored to your audience, different types of teaching methods, and ensuring there are different ways to interact and engage with the material.

The Keilim toolkit is about codifying how we want to live and the values and expectations we have for our communities. Use the [Sample Scenarios and Questions Sheet](#) that were part of this training.

For further assistance or questions about this resource:

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