

# **SRLP Collective Member Handbook**

## **SRLP Collective Member Welcome**

Dear \_\_\_\_\_,

Thank you so much for your interest in being a collective member at SRLP. The attached information will introduce you, in detail, to our structure, so that you can have a full understanding of how we operate. We want all of our collective members to have equal decision-making power and voice, and we recognize that the best way to achieve that is to have each person be fully informed about how we work, what is going on, and how to be heard. We hope that you will tell us what other information we can provide or clarify to help you understand how we work.

Please read this manual carefully and speak with your SRLP “buddy” about questions you have before signing the Collective Member Agreement. We’re really delighted by your interest, and look forward to working closely with you.

Sincerely,

Collective Development Team

# SRLP Collective Member Handbook

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## **Mission**

The Sylvia Rivera Law Project (SRLP) works to guarantee that all people are free to self-determine their gender identity and expression, regardless of income or race, and without facing harassment, discrimination, or violence. SRLP is a collective organization founded on the understanding that gender self-determination is inextricably intertwined with racial, social and economic justice. Therefore, we seek to increase the political voice and visibility of low-income people of color who are transgender, intersex, or gender non-conforming. SRLP works to improve access to respectful and affirming social, health, and legal services for our communities. We believe that in order to create meaningful political participation and leadership, we must have access to basic means of survival and safety from violence.

## **Organizational Goals**

- ⇒ To provide access to free, quality, respectful, affirming legal services for low-income transgender, intersex, and gender non-conforming people.
- ⇒ To use training, public education, policy reform, and precedent-setting lawsuits to end state sanctioned and institutional discrimination, violence, and coercion on the basis of gender identity and expression, which we understand as inextricably related to race and class.
- ⇒ To build a non-hierarchical collective organization that internally practices what we're struggling for by developing the leadership of low-income transgender, intersex, and gender non-conforming people of color.
- ⇒ To participate in the larger movement for racial, social, and economic justice that includes gender liberation and prioritizes the issues of those most affected by the systems of oppression under which we live.

## **Why a Collective?**

SRLP functions as a multi-racial, inter-generational collective of people committed to a broad understanding of gender self-determination. As a collective, we recognize that it is essential to create structures that model our vision of a more just society. We believe that in the struggle for social justice too often change is perceived as a product and not a process. We seek to use a non-hierarchical structure to support work that aims to redistribute power and wealth for a more just society. We also strongly believe that our community-based structure, which maximizes community involvement, will support the sustainability of our work and the accountability of SRLP to its constituency.

We have developed an organizational structure with a **Board** and five, equally important teams working together on a shared vision and mission. The **Direct Services Team** runs our legal clinic, makes determinations about how to take and handle cases, and sustains relationships with allied service providers. The **Public Education Team** creates and implements our trainings for other groups and organizations, creates and distributes our public education materials, and develops and maintains our website. The **Fundraising, Development and Finance Team** is responsible for raising money for our operations, planning our budgets, maintaining relationships with our donor base, creating fundraising events, and administering our financial systems. The **Collective Development Team** is responsible for recruiting staff and collective members, for making policies and programs regarding SRLP's diversity, and developing policies and procedures for SRLP staff and collective members. The **Policy and Organizing Team** is responsible for spearheading SRLP's policy reform initiatives, developing and implementing SRLP's organizing strategies, and creating and implementing SRLP's media advocacy work. See section 1.5 for details on the work of each team.

By creating an organization that functions as a collective, SRLP is developing a structure where people committed to gender self-determination, and trans, intersex, and gender variant people can take powerful leadership roles in transforming their own lives as well as their community and the world.

### **Core Values/Vision**

The following core values provide the basis of SRLP's work. It is the responsibility of all collective members to recognize and promote these values in all actions taken in SRLP's name.

1. We can't just work to reform the system. The system itself is the problem.
2. Oppressed people need to be empowered with the skills and vision to fight for their own liberation. For SRLP, this includes taking reasonable steps to provide necessary training and resources.
3. All oppressed people need to work together in solidarity to end all forms of oppression. For this reason, SRLP values coalition work with organizations whose stated missions reflect our organizational values.
4. We believe that the struggle for gender self-determination will in the end be fought by our whole communities, and it will win liberation for all of our people.
5. It is critical that transgender, intersex, and gender variant people and people of color, especially low-income people, youth, and people with disabilities, take leadership in our work. Furthermore, SRLP as an organization must actively work to realize this goal.

6. SRLP strives to maintain gender parity at all levels of the organization.
7. SRLP believes that the working environment of an organization shapes the work, and for this reason we strive to create an environment that is non-hierarchical in structure and operates by consensus.

### **Diversity Goals**

SRLP is committed to maintaining a collective body that is diverse in terms of age, race, economic status, class, ability, size, education, citizenship, national origin, ancestry, sexuality, employment status, religion, and gender. It is vitally important that the collective body reflects the communities it serves. To this end, the majority of the collective should be comprised of people of color, people of trans, intersex and gender variant experience, and low-income people. SRLP also strives to maintain youth, people with disabilities, and low-income people in leadership positions. These goals should inform all decisions made with respect to staffing, recruitment, programming, policy, service provision, outreach and education.

### **Anti-Oppression Practices**

We are committed to anti-oppression. This includes reflecting on our own privilege, being open to hearing that we have work to do to address internalized oppressive values or dynamics, redistributing power and leadership away from ourselves when it benefits the collective and the community, participating in ongoing training and learning throughout our lives to address these persistent dynamics, communicating clearly, and supporting other's communication

In order to create and maintain an atmosphere of anti-oppression beliefs and practices, SRLP affirms the following values and steps:

1. SRLP will absolutely not tolerate discrimination and prejudice based on any of the designators listed in section 1.5 of the Employee Handbook ("Non-Discrimination Clause").
2. SRLP strives to maintain a structure in which all teams and committees shall be ideally comprised of at least 50%+1 transgender, gender variant, and intersex people, and 50%+1 people of color. The Board shall be composed of 50%+1 transgender, gender variant, and intersex people, and 50%+1 people of color. At any given time, at least 50%+1 of "point people" will be transgender, gender variant, and intersex people and/or people of color.
3. SRLP recognizes that low-income people, as part of its stated constituency, play an absolutely crucial role in the work of the organization, and that these interests must be represented in decision-making processes. However, we also recognize that low-income people often face barriers which would

prevent them from regularly attending meetings, maintaining regular e-mail or telephone communication, etc. As such, SRLP strives to provide extra support for these people to attend meetings become otherwise involved. Concrete steps may take the form of follow-up phone calls, etc.

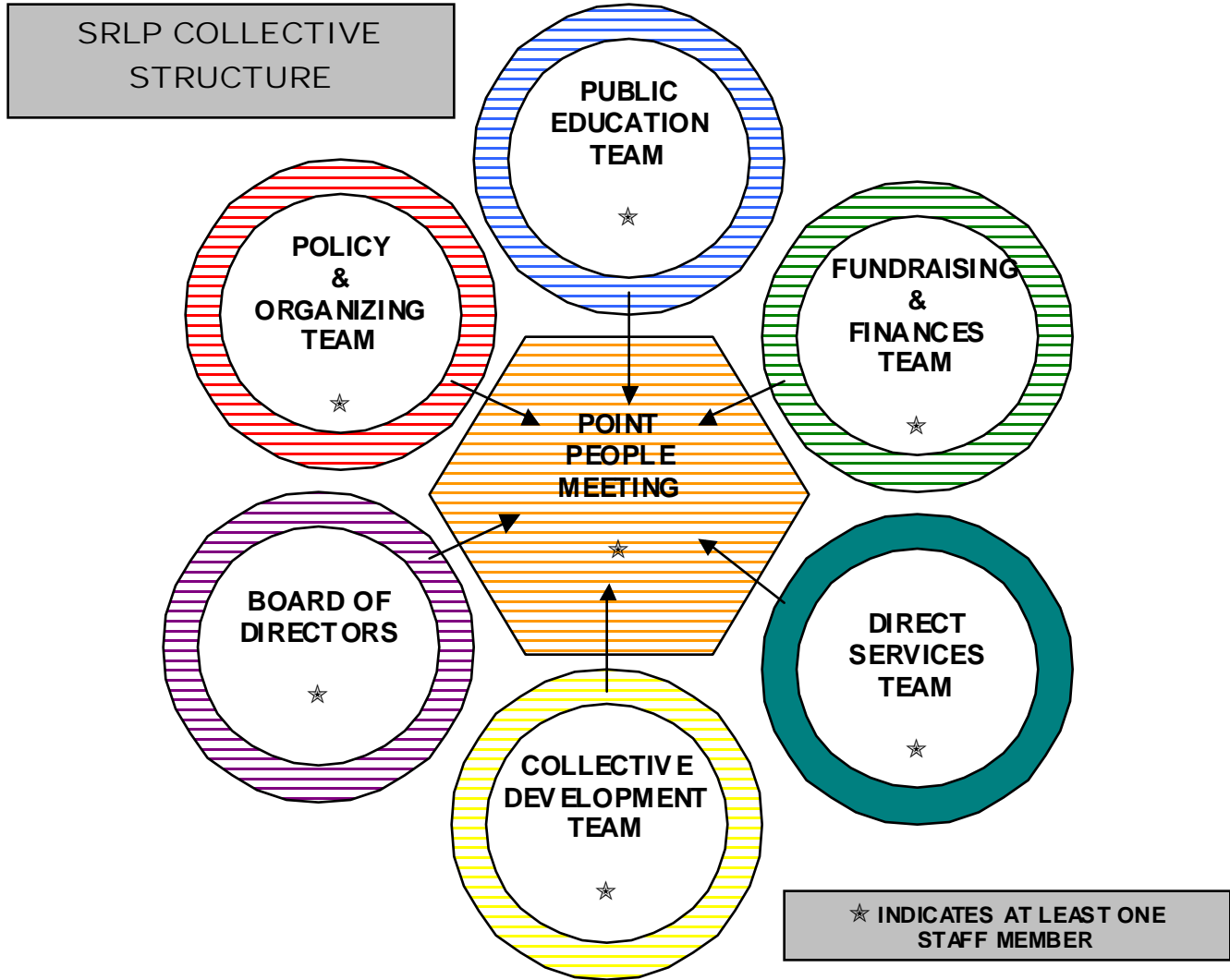
4. SRLP strives for gender equity in representation across gender spectrums, including people who are experiencing different levels of forms of transition or gender variance.
5. SRLP recognizes that in many anti-gender oppression movements, intersex people are often paid lip service. SRLP strives to go beyond this false inclusion and make a genuine and meaningful commitment by working in coalition with intersex organizations, striving to include intersex people in leadership roles and decision-making, and being visibly and respectfully outspoken on intersex issues.
6. SRLP encourages youth to take leadership roles, and will provide appropriate training and leadership development measures to ensure that youth have ample opportunity to acquire the necessary skills.
7. SRLP recognizes that often people with disabilities have been excluded from involvement in gender self-determination movements. SRLP strives to include people with disabilities in leadership roles and decision-making. SRLP also strives to take initiative with regard to making spaces and events accessible in all ways; this includes physical accessibility and the promotion of respectful attitudes and language.
8. In addition to simply recruiting transgender, intersex, and gender variant people, people of color, working class and low-income people, and people with disabilities, SRLP as an organization will use strategies of recruitment, training, and leadership building to support members of these groups.
9. Instead of veiling oppression behind empty claims of “diversity,” SRLP is committed to taking concrete actions around naming and dismantling white supremacy, patriarchy, ableism, heterosexism, and any other form of prejudice and discrimination in contravention of our Non-Discrimination Clause, as stated in section 1.5 of the Employee Handbook.
10. SRLP shall employ strategies of recruitment and training if at any point the organization is not meeting its stated representation goals.
11. All staff, Board and collective members, volunteers, and interns shall participate in regular multi-issue anti-oppression trainings, which shall be held annually.
12. SRLP recognizes and affirms that there is not one “correct” way to do things, and values diverse ways of being productive.

### **SRLP’s Structure and its Operation**

There are four major structures that guide the direction and support the operations of SRLP. They are: 1) The Teams, including occasional ad hoc committees; 2) Point people, team members who agree to be liaisons between the Teams and the Staff and Board; 3) The Staff, comprised of collective members who are paid to carry out key functions of SRLP; and 4) SRLP’s Board



of Directors. These structures offer opportunities to members of SRLP's community to contribute to the leadership of this organization. Together the people who join SRLP's Teams and those who serve as staff or Board members constitute the SRLP Collective.



In addition, SRLP welcomes the energies of people who wish to contribute their time or expertise to the organization in more limited ways. These volunteers are recruited, supported and integrated into the life of SRLP by Teams on an as-needed basis.

The following section describes the purposes and purview of these four formal structures and the roles and responsibilities of the people who are in them.

## 1.1 Teams

SRLP has five permanent teams (described in section 1.5) as well as occasional ad-hoc teams constructed to accomplish a specific, time-limited goal (such as our Independence Team which facilitated our move out of the Urban Justice Center and into our new space). Each team meets at least once a month, or more frequently as their work requires. The work of each Team is guided by a work plan that it develops annually and is approved by the Board of Directors.

Every team has a point person who helps to coordinate the team's communication internally and with the other teams. Teams are generally composed of a minimum of three persons. All team members meet twice annually with the full staff and Board at our Collective Retreats. These retreats are used to engage in planning for the organization as well as for team-building and people development.

## 1.2 Point People

Every Team will name a Point Person to serve for a term of one year whose responsibilities include: coordinating the development of a job description for the Team, calling and organizing the meetings, coordinating the setting of the agendas, following-through with notes, making sure a member of the team attends the board meetings, sharing information and shepherding the development of work plans for each Team. Point people are subject to a periodic review as established by the Collective Development Team.

To coordinate work across the organization, Point People from each of the Teams meet together monthly, and these meetings are open to any collective member, volunteer or intern who desires to attend. All Staff Members, including those who are not Point People are required to attend "Point Meetings." This will help ensure shared communication and consistency. These "Point Meetings" are an opportunity for the Teams to keep up on the work of each other, to communicate needs that one team may have of another (e.g. the Fundraising Team needs a detailed description of a new project that the Policy and Organizing Team is working on for a grant proposal) and to coordinate or

leverage one another's efforts. Any decisions made by any of the teams or by staff will be reported at these meetings and then brought back to the smaller team meetings and thus shared with the collective at large.

### **1.3 The Staff**

Staff members carry out key day-to-day functions of the organization. They are hired by the personnel committee as described in the Employee Handbook, and their performance is reviewed according to the procedures laid out in the Employee Handbook. Specific responsibilities and expectations for various staff positions are outlined in job descriptions approved by the Board of Directors. Staff members who fill these roles are paid according to what is laid out in the Employee Handbook. Staff members are automatically Collective members.

Staff members meet weekly to plan and coordinate the work of the organization. Each staff member is also a member of the Team or Team(s) that are most closely related to their job. In addition to their roles as team members, they also serve on those teams as Staff Liaisons to ensure that other team members have access to any information that may come from being at SRLP on a regular basis. In some cases, staff members may serve as Point People for the Teams, but no staff member should serve as point person for more than one team.

One staff person will serve as the official Staff Liaison to the Board to manage the affairs of the Board. That staff person will have the specific responsibility to schedule the Board meeting, handle all logistics for the Board meeting, develop an agenda in conjunction with Point People on the Teams and the Point Person for the Board, prepare meeting materials, document decisions made in the meeting, circulate and file minutes, communicate with members of the Collective about the meeting as needed and generally serve as official staff and Team liaison to the Board.

Detailed information about staff policies and procedures are outlined in SRLP's Employee Handbook.

### **1.4 The Board of Directors**

The SRLP Board of Directors is the body legally responsible for the organization. The Board works in partnership with the full Collective to carry out its responsibilities. Its members are fully integrated into the Collective.

The Board is charged with acquiring and managing resources that support the sustainability of the Sylvia Rivera Law Project. In these central roles, the Board is responsible for oversight and leadership for organizational development tasks including ensuring that there exists an articulated vision and mission, annual planning, program monitoring and evaluation, systems for staff hiring and performance review, oversight of and engagement in fiscal management and fund development, and engaging in self-assessment with the full collective.

The Board will also have a role in cross-collective committees on topics of staff hiring/review and grievance whose specific membership will be fluid:

When necessary, the Board will designate a Personnel Committee, which shall include at least one Board member and one non-Board member from the Collective Development Team. When necessary, the Personnel Committee may be expanded to include members of affected teams and other relevant parties.

The Personnel Committee shall exercise three functions: Hiring, Terminations (including lay-offs) and, and Grievances.

The Personnel Committee of the Board is responsible for drafting policies and for making recommendations for revisions for approval by the Board.

The Personnel Committee is directly accountable to the Board

◆ The grievance process: The Board has the responsibility of being involved in hearing and deciding grievances as needed according to the grievance procedure in section 6. Involved Board members, if any, would be recused from this task.

The Board of Directors includes up to ten members of the community. At least one member of the Board is a staff member, but no more than two staff members will be on the Board. Board members can also serve as volunteers, consultants, and resources to Teams. Members of the Board will serve a term of two years. A maximum of two consecutive terms may be served. Staff members who serve on the Board are limited to a one-year term. New Board members will be selected by a Membership Committee, created by the Board.

To carry out its functions, the Board meets four times each year and its members also participate in the twice yearly collective retreats. One person from each team will attend board meetings to keep board members fully informed and engaged in organization problem solving and leadership. Any collective member can attend a Board meeting. Note that the Board has the right to call a closed meeting as needed, particularly when dealing with sensitive issues regarding conflict, staff performance, or termination of a collective member or staff member.

Board meeting topics will include: Team Updates and problem-solving, Budget Review and Approval, Work Plan Review and Approval, Fundraising Planning, and review of special initiatives as needed.

The Board will elect their own Board Chair who will be responsible for coordinating meetings and communicating with staff and collective members. This person can work in conjunction with the Staff Liaison to the Board (described in section 1.3) There is a finance committee of the Board that is responsible for the oversight of the financial health of the organization. The finance committee of the Board will also be responsible for coordinating Board fundraising plans and activities. Like the other teams, the Board will also have a Point Person to attend the Point Meetings (this person may also be the Board Chair). Finally, the Board will also nominate a Personnel Committee coordinator to facilitate putting together the Personnel Committee as needed.

## **1.5 Team Job Descriptions**

### Fundraising Development and Finance Team

Responsible for grant writing, managing individual donors, planning, goal-setting, developing relationships with both institutional and individual donors, research, house parties, events, major donor campaigns, newsletter, creating the budget, cash-flow, maintaining QuickBooks, making sure everyone gets paid (staff, vendors, insurance, taxes), processing checks and reimbursements.

*Ideal Qualifications:* grant writing, excitement about newsletter, graphics, editing and research, experience planning events, data entry/mailings, budgeting sensibilities, knowledge of Quick Books, database comfort, File Maker Pro, Quark, PageMaker (those who already know/do this, as well as those with energy and high interest)

### Public Education Team

Responsible for creating training curricula, implementing trainings, organizing speaking engagements and screenings, provide vision and development of brochures, videos, website, and distributing these materials. Each Team is responsible for preparing a one-page document about their work to the Board and ensuring that the Point Person or other representative of the Team is at the meeting. Works with Organizing/Policy Team on media strategy.

*Ideal Qualifications:* HTML skills, graphic design, experienced trainers, public speakers, people with film experiences and connections, coalition and university connections (those who already do this, as well as those with energy and high interest), fluency in language(s) other than English.

### Direct Services Team

Responsible for running the legal clinic, deciding what cases to take, developing referral lists, guide books about how to do the work and resource guides. Creating brochures that are about services, hiring and supervising the legal interns, assess the client services and run these services, evaluate and report about this work. Maintain connections to other service providers and agencies.

*Ideal Qualifications:* case management or legal skills, time during the day, high client engagement skills, people with connections to good referral sources (who can call in favors), experience in court.

### Collective Development Team

Internal: Responsible for creating policies and handbooks around staff including – accountability systems, compensation and benefits, staff development, organizational culture, work environment, mediation/conflict (grievance), making decisions about inter-collective team member appointments.

External: Responsible for volunteer coordination, including outreach, training, support and dealing with conflict. Responsible for identifying diversity needs of collective and coming up with creative strategies for maintaining diversity. Creating and implementing Collective Orientation once every 6 months or more for new collective members. Coordinates interviews of potential collective members, connects them with buddies. Coordinates evaluation system for collective members. Also includes writing letters of recommendation and responding to inquiries.

*Ideal Qualifications:* experience with personnel policies, research skills, conflict mediation, well-connected in the community - know a lot of people or worked in a lot of nonprofits, strong understanding of anti-oppression, people/volunteer management expertise/experience, writing skills.

### Policy and Organizing Team

Responsible for vision and implementation of policy reform work (juvenile justice, adult criminal justice, homeless shelter access, anti-discrimination law, access to health care, etc.), advocacy and organizing. Coordinates media strategy (with Public Education Team).

*Ideal Qualifications:* good at working in groups and connections to allied organization and folks in policy groups, connections to public officials and policy makers, those who have organized and with policy or reform experience,

strategic thinkers, writers, good getting folks to turn out (good communicators), folks with history in NYC, people affected by the policies, media advocacy skills

## **2. Joining the SRLP Collective**

SRLP's collective recruitment, retention, and support are a deliberate process designed to support our goals of community leadership development, organizational accountability and sustainability, positive organizational culture, and community empowerment. Our goal is to create a supportive environment for dedicated activists to work together on projects we are passionate about, and achieve goals that will increase the well being and political power of our communities.

SRLP's commitment to maintaining a collective body that is diverse, our commitment to developing new leadership and under-heard voices in our community, and our commitment to creating teams staffed by people who have sufficient time to commit to team work, may sometimes result in a determination that an applicant is not suitable for membership at this time. However, there are many roles that community members and allies can take in SRLP's work, as volunteers and resources to our various teams that can be an appropriate alternative to team membership. SRLP is committed to communicating clearly with our community about our recruitment and retention goals and strategies, and working to make sure that the voices of those affected by and interested in our work are heard.

SRLP seeks to bring on collective members who:

- Are committed to gender self-determination, economic justice, racial justice, and an end to ableism, xenophobia, sexism, ageism and all other forms of oppression;
- Are excited about the mission and work of SRLP;
- Have direct experience with the communities effected by the injustices SRLP seeks to remedy;
- Are committed allies to anti-oppression work for communities of which they are not a part;
- Learn from others and work well on teams;
- Are willing to actively support the building of leadership among people traditionally marginalized in social and political movements;
- Understand and are committed to our collective process (meaning they get the importance, power and struggles of collective work and they understand that we will really depend on them to follow through and be accountable);
- Can commit to at least 1 year of involvement, at least 15 hours per month (teams may increase time commitments for team membership depending on current workload and strategy);

- Are willing to ask for help when they need it, be realistic about their time commitments, and support other members in doing so;
- Are willing to be self-reflective and self-aware and engage in efforts to evaluate and improve team functioning and individual performance

The Collective recruitment process is designed to help SRLP identify committed activist who can give a significant time commitment to join an SRLP team and work concertedly on our goals. We hope that this process maximizes accountability, efficiency, and support for our collective members. Below are the basic steps to becoming a collective member.

1) The name(s) of people interested in joining/contributing to SRLP's collective are shared with a current member of the collective. Anyone might be a source for a name, i.e., current collective member, someone from larger community, someone from a colleague organization, etc. The source of the name is asked for modest background on the person: name, contact information, reason for interest in SRLP; assets/expertise/connections they could bring to the work; what aspect of SRLP interests them most (which Team they'd want to join); and a profile of the person explaining how they fit into SRLP's diversity goals. A nomination form (see Appendix) is completed by the applicant or nominator.

2) The current member of the collective offers the nomination form(s) to the Collective Development Team, which will review the potential "fit" of the nominee along various characteristics such as: 1) will nominee add to SRLP's diversity mix?, 2) can another collective member be absorbed at this time into the Team of interest, or generally? It is key that the review is carried out in a highly respectful and confidential manner. The Collective Development Team will decide whether or not the nomination will move forward and be presented to the Teams.

3) Point people will inform their teams of the nomination to find out if the nominee is known to any member of the collective and if there are there any significant concerns or particular assets that the nominee might bring.

4) If no objections have been offered, a member of the Collective Development Team will call the nominee to initiate the interview process. In that first call, the Collective Development Team member explains the SRLP team structure to the nominee, affirms basic information about the nominee previously collected and affirms which Team ze would be best suited to join.

5) In-person or phone Interviews with potential collective members are conducted by at least one member of the Collective Development Team and at least one member of the team the potential collective member seeks to join.

6) After the interview the relevant team will decide whether or not to move forward with the potential collective member. They will then notify the Collective



Development Team and identify a buddy for the new member. See section 3.3 for more information about the buddy system.

7) The “buddy” meets with the potential collective member to go over this handbook, discuss SRLP’s structure and operations, discuss the team’s current projects and answer any questions ze might have.

8) The potential collective member decides to make the commitment to join the SRLP collective and the team, and signs the Collective Member Agreement.

9) The new collective member begins working with the team, and attends the next collective orientation. The “buddy” works to support and help orient the new member.

### **3. Orientation**

#### **3.1 Introduction to the Collective**

Upon signing the Member Agreement, the new member will be formally introduced to the entire body via email so that everyone is clear that ze has joined us and what team ze is working with. Collective Development Team will initiate the introduction.

#### **3.2 Orientation Sessions and Initial Obligations**

Every new collective member will receive a thorough orientation to the collective facilitated by their “buddy” prior to beginning any team/collective work. In this orientation they will learn about SRLP’s history, structures, procedures, and work. They will also review the Collective Handbook and read over the consensus materials.

New collective members are also encouraged to attend the first two Point Person Meetings that occur after they have joined the collective, so that they can learn more about the work of the other teams and the structure.

#### **3.3 Buddy System**

In an effort to support the new collective member, SRLP will identify one person on the new collective member’s team who will be a buddy to hir. The goal of the buddy is to check in with the new member regarding hir goals for membership, any need ze might have for information or support to do hir work, and to be a resource in terms of skills and knowledge. The buddy will help the collective member develop a support plan and will be one of the people on the check-in/evaluation team for that collective member.

### 3.4 Check-In/Evaluation

After the first three months of working with the collective, 3 or more people (at least one being the member's buddy) will meet with the member to check-in about his participation with the collective. The goal of the session is to dialogue with the new member about how things are going:

- How are they doing?
- Are there areas where they can identify that they need support?
- Who can offer them this support?
- Are there questions/concerns they want to raise?
- Is there feedback that can be offered to the new collective member in terms of strengths/areas for improvement?
- Does the new member feel appreciated in the organization for the work they are doing?

After the initial 3-month check-in, all collective members can expect to engage in a formal review around the time of their first year anniversary of association with SRLP, or earlier if requested or thought necessary by peers on the team. The Collective Development Team is responsible for initiating the 3 month check-in meeting and designing the annual review process. The review process will include identifying members of the review team, preparing review tools including a self-assessment tool for Team members, and clarifying expectations on both sides for the review.

### 3.5 Limits

Since we strive to create a culture of healthy and sustainable work collective members should be realistic about their commitment levels. As such, each member is limited to being on no more than two teams.

If a collective member wishes to be on more than two teams or is interested in changing to another team, that request is brought to the Collective Development Team.

## 4. **Accountability**

Several accountability structures will enable SRLP to manage its work:

- At an **annual retreat**, all members of the collective meet to review obligations and to develop an overall organization direction, yearly goals for program and organizational development and associated tasks for the coming year for SRLP.
- Based on work at the retreat, each Team develops drafts of **work plans** that specify how their Team will achieve the goals/tasks named for it at the

retreat. Work plans include action steps, Team member assignments and time lines. The work plans are designed to enable SRLP to achieve the direction, goals and obligations outlined by the collective.

- The **Teams will review and comment upon one another's plans** prior to a review and comment on the work plans at one of the two annual meetings of the Board of Directors. The Board of Directors reviews and approves the annual work plans developed by the Teams.
- On a day to day level, Team members use **focus and accountability sheets** to manage progress on work plans. These focus and accountability sheets (which describe tasks and give space for notes of progress) are filled out by Team members and put in a binder. Teams can then refer to these sheets in their next meeting to assess what has been accomplished. [See appendix for sample form.]
- **Teams periodically assess their progress** (monthly or every 2 months) against their Team work plan. Team members use Team time to problem-solve and trouble-shoot about elements of the work plan.
- **Point People report on their Team's progress** to other Point People **at regular meetings**. Each team should fill out the team/staff reporting form prior to each Point People meeting. Staff is also expected to fill out the reporting form and present at the Point People meetings. The Point People of other teams are invited to help problem-solve and trouble-shoot as necessary.
- SRLP is committed to the principle of **strategic planning**. Every two to three years, the collective will engage in full strategic planning to ensure that the organization is positioned well to achieve its vision and carry out its mission.

## 5. Decision Making

While all of our collective members have equal decision-making power and voice, we recognize that certain people and teams in the collective are better positioned to make certain decisions than others and full-collective decision making can be a logistical nightmare. Since all decisions will be made according to consensus principles (please refer to consensus training materials) and based on our core values and mission, we do not anticipate much conflict. In order to be really clear about what decisions are made by whom, there will be a decision making chart (see appendix) outlining which teams are responsible for making which decisions. Most decisions will be made in staff meetings, team meetings, cross-team meetings and at the retreats. All decisions will be reported at the point meetings and through decision making reporting forms. The reporting forms will allow us to maintain accountability. These procedures can and should be revisited if conflicts arise.

## 6. Grievance Procedure

SRLP recognizes that at times, members of the collective or clients will have

grievances about the manner in which work is handled. The Collective Development Team is the Team that will lead on the work of reviewing grievances and reviewing the implementation of the process. It is anticipated that the Team will evaluate the efficacy of the proposed process and recommend improvements over time. Currently, SRLP's system for handling grievances, whether about the quality or pacing of work or about the professional manner of colleagues, is as follows:

All collective members are encouraged to resolve problems and differences, work-related or otherwise, with each other. Should the parties wish to pursue mediation, they should consult the Collective Development Team. If informal advice and conflict resolution processes fail, the formal route may be pursued:

The aggrieved person should state the complaint in writing to the Collective Development Team within 2 weeks of an incident or acquirement of information giving rise to the complaint. The Collective Development Team will be responsible for notifying the person against whom there is a grievance of the process. Throughout, the Collective Development Team shall aim to strike a balance between confidentiality and transparency. The Collective Development Team shall conduct a thorough investigation and attempt to resolve the problem within 2 weeks if possible.

#### **a. Investigation**

If the grievance is with a member of the Collective Development Team or the Personnel Committee, the person against whom there is a grievance shall not take part in any of the investigative or decision-making processes. If the grievance is with an entire team or committee, the aggrieved should issue a grievance with the Board. The Board will then appoint an *ad hoc* committee of three Board members to attempt to resolve the grievance. The aggrieved employee should submit the grievance in writing to the Board within 2 weeks of the incident or acquirement of information giving rise to the complaint. The Board or Board committee will attempt to resolve the problem within 2 weeks.

In all cases, investigative and decision-making bodies should never include people who are biased against the filer. All biased parties should recuse themselves. In addition, both aggrieved and person or team against whom there is a grievance can voice concern with any perceived bias.

During investigation, the investigating body shall take care to hear and consider the statements and perspectives of all involved bodies. The investigating body shall also take care to avoid any unnecessary or unwarranted harm or discomfort to the parties involved.

The identity of the individual making a report will be protected as much as is practical. In order to maintain workplace safety and the integrity of its investigation, SRLP may suspend employees, collective or Board members,

interns, or volunteers, wither with or without pay, pending investigation. The proceedings and results of all investigations must be documented in written form.

#### **b. Resolution**

Once a grievance investigation has been concluded, the decision-making body (most often the Collective Development Team) shall take steps to resolve the situation. The resulting actions may or may not be developed with the input of the person or team against whom there is a grievance and the aggrieved, depending on the nature of the offence. If necessary, the Collective Development Team and the aggrieved may involve a mutually agreed-upon neutral third party in a meeting to try to resolve the situation.

#### **c. Discipline**

SRLP maintains a “just cause” philosophy regarding any necessary disciplinary action that might result from a grievance investigation. Toward this end, SRLP collective members will be notified about problems and given a chance to correct them; allegations of misconduct will be fairly investigated; disciplinary action will be based on proof of misconduct; policies and procedures will be enforced fairly; and any disciplinary action will be appropriate to the misconduct.

The Collective Development team shall maintain initial responsibility for disciplinary proceedings, and will abide by the following procedures:

1. Verbal warnings
2. Written warnings
3. Probation: the probation plan will include a timetable, and a summary of the review meetings shall be given to the collective member employee.
4. Separation.

The filer will be notified of the outcome of the grievance.

#### **d. Appeals**

If not resolved to the aggrieved person’s satisfaction, ze may appeal in writing, within 2 weeks of the response, to the Personnel Committee, which shall be appointed by the Board as necessary. The Board should be cc-ed. The Personnel Committee should designate a person who will take responsibility for distributing the grievance among the committee and making sure that the grievance is handled swiftly and fairly. The Personnel Committee should attempt to resolve any grievances within two weeks. The decision of the Personnel Committee will be the final step in the grievance process.

If the grievance is not resolved to the filer’s satisfaction, SRLP will give the filer information for contacting any appropriate government agencies when applicable (as in the case of sexual or other forms of harassment).

Only full members of the collective, active volunteers in good standing or clients can bring grievances.

## **7. Leaving the Collective**

### **7.1 Leave of Absences**

There may be the occasion when members of the collective will need to take a leave of absence. The Collective Development Team will consider requests for leaves of absence. Requests will be considered in cases of personal or family health or care issues; changed circumstances in arenas of employment, education or housing; or other unexpected personal emergencies or challenging circumstances.

Collective members should make their requests in writing to the Collective Development Team. Requests that meet the criteria can be granted for lengths of time no greater than six months. If a member of the collective must withdraw from the collective for a period greater than six months, they will need to re-apply for collective membership before their return. Staff Members should refer to the Employee Handbook for additional details regarding leave.

### **7.2 Involuntary Termination of Membership**

SRLP strives to make a cooperative, open and honest environment for our work. The accountability policies outlined in this handbook provide multiple forums to meet these aims. SRLP considers termination of membership as the last step to dealing with serious concerns or situations. Even so, we understand that the occasion for termination of membership may be necessary.

When a grievance has been brought against a collective member, after a full grievance process is complete, the board can make a determination to terminate the collective member's membership. Termination of membership may result because of un-resolvable issues of work quality or pacing or untenable inter-personal conflicts. To arrive at a judgment about termination of membership in the collective, responsible Team members would follow steps that directly parallel those in bringing a grievance. In cases of issues about work quality or pacing, the grievance process would also incorporate elements of a formal performance review including review of expectations for performance and performance objectives as outlined in a work plan or other relevant materials and progress against those expectations and objections.

### **7.3 Member Initiated Departure**

Any collective member who will be leaving her role must be proactive about that leaving process. At a team gathering, she must introduce a clearly outlined transition plan, including dates. This can be flushed out with the support of her

team and the Collective Development Team, especially those most impacted by hir leaving. Members are encouraged to inform everyone of their plans to depart as soon as possible, but no later than 1 month before they plan to end their membership. Working with their team and the Collective Development Team, they should outline a plan to pass on things they have been responsible for:

- Projects
- Systems of operation
- Paperwork/documents
- Relationships to individuals/organizations in the community that are important to SRLP. This includes introducing another SRLP member to the community member or organization to help establish contact to sustain the relationship.

In the interest of creating a smooth and supportive transition, there should be a closing gathering. The goal of this time is to have a supportive/friendly dialogue between everyone about why the member is leaving. Everyone who can attend is encouraged to. It is a chance to ask questions and facilitate the transition. It is also a chance to clearly communicate to everyone the role that the outgoing member will be assuming in relation to SRLP and answer some of the following questions:

- Will they remain active in SRLP in a new role (volunteer, contact, resource)?
- Will they be around or are they moving?
- How can we stay in contact?

## **8. SRLP Office Policies**

### **8.1 Confidentiality**

All collective members must keep client information confidential in accordance with all relevant laws and professional rules, as well as in keeping with SRLP's respect for clients' right to control the disclosure of their personal information. It is the responsibility of collective members to ensure that any volunteers, consultants, interns, or others they work with understand the necessity of maintaining client confidentiality.

### **8.2 E-mail**

Every employee, intern, and collective member can have an SRLP e-mail account upon request. SRLP e-mail accounts can be accessed at [www.srlp.org/webmail](http://www.srlp.org/webmail).

### **8.3 Personal use of office resources**

Keeping in mind SRLP's limited funds, collective members should keep their personal use of office resources to a minimum. If a collective member does make significant personal use of office resources (for example, places a long-distance personal phone call), ze should inform the finance team and reimburse SRLP.

#### 8.4 Food Policy

Each team gets \$40/month to be spent how they decide (\$480 per year)  
\$100/semester for intern appreciation (\$200 per year)  
\$40/ month for food and supplies for office (\$480 per year)  
\$40/quarterly for newsletter and direct mailing work parties (\$160 per year)  
\$400/year for CSA (to be evaluated on an annual basis) (\$400 per year)

#### 8.4 Community supported agriculture

SRLP may pay for a share of the Chelsea community supported agriculture (CSA) project during the growing season. Collective members (as well as clients) may take as much of the weekly share of fresh, locally-grown fruits or vegetables as they like. For more information about the program, see <http://www.chelseacsa.org/>. Staff members will also share certain responsibilities related to CSA (see the Employee Handbook for more information on Staff Member responsibility).

#### 8.5 Travel Policy

SRLP's policy on deciding about who attends conferences and how to allocate the travel and conference budgets will be determined by the Collective Development Team in conjunction with the Fundraising and Finance Team.

#### 8.6 Handbook Revision

All changes to this Handbook will be initiated by the Collective Development Team. Any policy changes must be sent to the Board for approval. Suggestions for changes by staff and leaders can be forwarded to the Collective Development Team at any time

### **SRLP Collective Member Agreement**



The Collective Handbook describes important information about becoming a collective member at SRLP. I acknowledge that I have read this handbook, and discussed my questions and concerns with other collective members on my team or on the Collective Development Team. I am committed to the mission of SRLP, and have decided to become a collective member. I can commit to work for at least a year on one of the SRLP teams, and agree to follow the principles and procedures outlined in this Handbook, and work respectfully and collectively with my team members and the rest of the collective.

Date: \_\_\_\_\_

\_\_\_\_\_ signature of New Member

\_\_\_\_\_ name (printed)

\_\_\_\_\_ signature of New Member

\_\_\_\_\_ name (printed)

# **Appendix**

- Collective Member Self-Evaluation Tool
- Team Self-Evaluation Tool
- Focus and Accountability Task Sheets
- Collective Member Nomination Form
- Team/Staff reporting form
- Decision making chart

## Collective Member Self-Evaluation Tool

Name \_\_\_\_\_

Team \_\_\_\_\_

Date I Became a Member \_\_\_\_\_

Date of Last Evaluation (if any) \_\_\_\_\_

Today's Date \_\_\_\_\_

Name of "Buddy" \_\_\_\_\_

- A. (If first evaluation only, if not, skip to C) What was it like to become a part of your team? What was easy or difficult about adjusting to the team and becoming an active participant?
- B. Was it easy to get caught up on the team's work when you joined? If there were difficulties, what would you attribute them to?
- C. Do you feel you have been an active participant in your team in the last evaluation period?
- D. Have you been able to attend team meetings regularly?
- E. Have you had good communication with your team members? What, if any, obstacles have there been to communication with team members?
- F. How would you like to improve your communication with your team members?
- G. Have you been able to complete your tasks on the schedule you and your team members have agreed to? What obstacles, if any, have there been to successful completion of your work?
- H. How would you like to improve your accountability to your team for work you are collaborating on?
- I. Have you felt supported by your buddy? What has worked or not worked about the buddy system for you?
- J. Have you been able to attend retreats and other all-collective gatherings? What obstacles, if any, have there been to your attendance and participation?
- K. How would you like to improve your relationship with the entire SRLP collective?
- L. What changes would you like to see in the way your team operates?
- M. What changes would you like to see in the way the whole collective operates?
- N. What changes would you like to see in your participation or interaction with your team or the collective as a whole?
- O. Overall, how would you describe your experience as an SRLP collective member over the last evaluation period?

## Team Self-Evaluation Tool

Team \_\_\_\_\_

Date of Last Evaluation (if any) \_\_\_\_\_

Today's Date \_\_\_\_\_

People Participating in Evaluation \_\_\_\_\_

---

- A. Staffing the Team: Retention, Diversity, Sufficiency of Staff Numbers
  
- B. Meeting: Scheduling, Attendance, Length of Meetings, Efficiency, Use of Consensus Process, use of accountability sheets, consistency between meetings, facilitation
  
- C. Relationships/Dynamics: Conflict Resolution, Fun, Support of New Team Members
  
- D. Work plan: Was it Realistic? Did we follow it? Are we on track? Have we revised when necessary?
  
- E. Communication with other teams: have we attended the point people meetings, have we participated, are we collaborating with other teams when appropriate, are we attending the retreats
  
- F. What improvements would we make in each of the above categories?

## Focus and Accountability Task Sheet

<b>Team:</b>		
<b>Team member(s) responsible:</b>		
<b>Start Date:</b>	<b>Due Date:</b>	<b>Date of Completion:</b>
<b><u>Task:</u></b>		
<b><u>Notes on Progress:</u></b>		

## Collective Member Nomination Form

Name: \_\_\_\_\_

Contact Information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Interest in SRLP: \_\_\_\_\_

Team: \_\_\_\_\_

Background: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How person fits into SRLP's diversity goals: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Nominated by: \_\_\_\_\_

Date of Nomination: \_\_\_\_\_ Sent to Collective Development Team:

\_\_\_\_\_

Nomination sent to Collective: \_\_\_\_\_

Initial Phone Call made by: \_\_\_\_\_ Date: \_\_\_\_\_

Second Interview with: \_\_\_\_\_ Date: \_\_\_\_\_

Buddy assigned: \_\_\_\_\_

Notes:

## **SRLP TEAM & STAFF REPORTING FORM**

To be completed by all collective teams and staff members and presented at point people meetings and biannual collective retreats

**DATE:**

**TEAM OR STAFF NAME:**

⇒ **PLEASE LIST MAJOR ACCOMPLISHMENTS AND/OR WORK UPDATES:**

⇒ **PLEASE LIST MAJOR DECISIONS MADE:**

⇒ **IS THE TEAM/STAFF IS WORKING TOWARDS ACHIEVING ITS WORK PLAN GOALS & OBJECTIVES?**

⇒ **IS THE TEAM/STAFF ON TRACK WITH WORK PLAN DEADLINES & TASKS? IF NOT, HAS THE TEAM MADE A PLAN TO REVISE AND SET NEW DEADLINES?**

⇒ **HAVE YOU ENCOUNTERED ANY CHALLENGES? IF SO, HOW HAVE YOU DEALT WITH THEM?**

⇒ **PLEASE LIST AREAS WHERE YOU NEED SUPPORT (IF ANY) AND WHICH TEAM OR STAFF CAN BEST SUPPORT YOU:**

## SRLP DECISION-MAKING CHART

TASKS OR FUNCTIONS	DECISION-MAKING ROLE			
	Who's <b>Responsible</b> For Initiating This Action?	Whom Should They <b>Consult</b> Before Acting?	Who Should Finally <b>Approve</b> ?	Who Do They Need to <b>Tell</b> about the Action?
⇒ <b>Position Development, Messaging and Communications</b>				
<b>Keeping/Refining Mission/Vision/Values</b>	Collective Development Team	Total Collective	Total Collective @ retreat	Total Collective @ retreat
Deciding to Take a Position on a issue	Staff	Board	Board	Total Collective
Messaging and Preparing Written Communication Products (where fast turnaround is needed)	Public Education Team	Staff	Staff	Total Collective
Communications Strategy Implementation (external)	Public Education Team	Staff	Public Education Team	Total Collective
<b>Communications Strategy Development</b> (internal)	Collective Development Team	Staff	Collective Development Team @ retreat	Total Collective
⇒ <b>Organizational Goal-Setting and Planning</b>				
Develop organizational Goal-Setting and Program Planning Process	Collective Development Team	Staff	Total Collective @ retreat	Total Collective
Teams Work Plan Development	Teams	Team Members	Total Collective @ retreat	Total Collective
⇒ <b>Financial Planning</b>				
Implementation of a Fundraising Strategy	Fundraising Development and Finance Team	Staff and Collective @ point people meeting	Board	Total Collective
Monitoring and Reporting about Financial Situation	Fundraising Development and Finance Team	Staff	Board	Total Collective
Developing Organizational Budget	Fundraising Development	Staff	Board	Total Collective
Developing Fundraising	Fundraising	Staff	Board	Total Collective



Strategy	Development and Finance Team			
Responding to a Cash Flow Problem	Fundraising Development and Finance Team	Staff	Board	Total Collective
Deficit/Shortfall Planning	Fundraising Development and Finance Team	Staff	Board	Total Collective
<b>TASKS OR FUNCTIONS</b>	<b>DECISION-MAKING ROLE</b>			
	Who's <b>Responsible</b> For Initiating This Action?	Whom Should They <b>Consult</b> Before Acting?	Who Should Finally <b>Approve</b> ?	Who Do They Need to <b>Tell</b> about the Action?
⇒ <b>Planning and Care of Human Resources</b>				
Personnel Policies Development/Changes	Collective Development Team	Staff and Attorney	Board	Total Collective
Collective Handbook Development/Changes	Collective Development Team	Staff and Attorney	Board	Total Collective
Evaluating Staff Performance	Collective Development Team		Board	
Hiring & Termination	Personnel Committee	Collective Development Team	Board	Total Collective
Resolving Organizational Conflicts	Collective Development Team	Staff Board as needed	Staff Board as needed	Total Collective
Board Development and Board Care	Board	Staff and Total Collective	Board	Total Collective
⇒ <b>Program-Level Decisions</b>				
Giving Support to Other Organizations <i>(e.g., financial endorsements of allies, offering labor)</i>	Staff	Fundraising Development and Finance Team <i>(if over \$50)</i>	Staff	Total Collective
<b>Choosing Partners for the Work</b>	Staff or relevant teams		Staff	Total Collective