

Supporting and sustaining staff well-being in organizational strategy

Lessons learned from three organizations in Dane County, Wisconsin:
GSAFE, Freedom Inc, UNIDOS
Fall 2023

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About this report

In Fall 2023, three organizations based in Madison, Wisconsin, convened in a series of discussions about their varied approaches to integrating staff well-being into organizational strategy. UNIDOS, Freedom, Inc., and GSAFE had each received funding from [CORE](#) over several years to do staff well-being work. CORE invited the three organizations to share lessons learned. The three organizations enthusiastically accepted, seeing an opportunity to learn from each other as well as to build connections of mutual support as they deepened and sustained their strategies moving forward.

This report documents some of the insights, strategies, tools, and key questions that these three organizations surfaced in their discussions. It was written by Cynthia Lin, who facilitated the discussions (bio at end).

In sharing this report, Freedom, Inc., GSAFE, and UNIDOS hope to support the development of shared values and coordinated practice among social justice organizations – both locally and beyond, both in their respective fields and in intersecting spaces. Their vision is to grow the baseline of staff well-being support across organizations, to enlist the buy-in of funders, and to catalyze spaces for mutual support and learning.

On CORE's part, this project is part of CORE's 14 years of relationship-building, programming, and funding at the intersection of inner well-being and social change. For more information about the

trajectory of this work and CORE's partnerships with the three organizations, see the background section at the end of the document.

Defining staff well-being and why it matters

For Freedom, Inc., GSAFE, and UNIDOS:

Staff well-being means centering staff's humanity alongside and as a part of the communities their organizations serve, organize for and with, and are accountable to.

The wholeness of self - including physical, emotional, financial, mental needs - is taken into consideration in organizational strategy, practice, policies, and culture.

When well-being is present, staff:

- are able to balance work toward shared purpose and a full and healthy life outside of work, which may also include political commitments and liberation work beyond the workday context
- feel valued and taken into consideration in decision making, able to communicate openly with supervisors & management
- may be at lowered risk of burnout, contributing to organizations' capacity for retention

While "wellness" aspects of well-being often conjure notions of health care, holistic healing modalities, and meditation traditions, these organizations think of it more broadly (while also incorporating practices from these sites of wellness). In movement spaces, there has been a shift away from "self-care" as something individuals are responsible to do to restore themselves enough to keep doing the work. There is increasing commitment to integrating community care into organizational and movement practice and culture, especially as the COVID-19 pandemic prompted many of us to consider how we do this as neighbors and community members.

This matters to UNIDOS, GSAFE, and Freedom, Inc., because the work they do engages trauma at various levels - intergenerational and historical trauma, collective trauma, individual trauma - and the workers who offer care and organizing in the face of trauma both need to account for this in their strategies and are impacted by it. Tending to these impacts is necessary to be able to sustain and support staff. And also, integrating staff well-being into organizations' DNA is an opportunity to embody internally the same values that animate their programs and strategies. As one of the staff who participated in these gatherings said, "Organizing is healing." Healing is not a separate activity but rather a commitment that connects the work that organizations do inside and outside.

For reference, some additional frameworks and tools are listed in a resource section at the end of this document.

Values and principles for integrating staff-well-being into organizations

Some overarching themes emerged from the dialogues that UNIDOS, Freedom Inc, and GSAFE had with each other. They are distilled here into principles.

1. Make it an explicit priority and value, set shared definitions, and resource it. Having shared, explicit expectations about well-being - what it is, how we practice it, what this means for how we engage each other - is a core condition for it being a felt reality in organizations. And budgeting for practices, policy, and cultural commitments makes it sustainable.

2. Decolonize and reclaim healing, well-being, and rest. “You don’t have to be a rich white guy to have them! You deserve it too,” as one participant said. Furthermore, staff at culturally-specific and community-led organizations often have lineages of healing tradition and practice - even if they are disconnected from them - that can inform approaches to well-being in ways that intervene on capitalist, colonial, and/or white-centered frameworks.

3. Wellness and well-being are not at odds with organizational purpose and mission work. When organizations talk about staff well-being, it can sometimes feel at tension with having rigor in their purpose and accountability to their communities, but “rest and rigor is not either/or!” This felt tension may be a sign that there are implicit cultural expectations and norms to investigate, perhaps an undue - and sometimes internalized - sense of urgency that signals to staff they have to overextend for the sake of their work.

As an alternative, participants in these dialogues reflected on the importance of extending the same ethic of care and values to staff and clients/members alike, and also that their internal work on healing and well-being gave them deeper tools and capacity to do that with participants in their work (as well as in their families and personal lives). In fact, one organizational leader spoke to the importance of political imaginations that include rest: “Does the world I want to build include overworking ourselves? No, it includes us sitting and drinking lemonade on the porch. We need to decolonize from capitalism.”

4. Organizational cultures and agreements that honor boundaries are essential for staff well-being. This includes boundaries around time and energy for work (in balance with personal time and energy), communication norms, and how they show up in their own communities. Boundary work can be complex for multiple reasons. Staff in service and organizing roles often come to these positions with a lifetime of personal experience caring for, translating for, supporting their own parents, siblings, and communities. Some reported a need to let go of an enormous amount of guilt as they

learned to keep their own boundaries. Boundaries are also deeply personal and operate differently for different individuals.

For some, their personal and organizational commitments to liberation are so intertwined, that they often carry their role well beyond their work hours. One staff person said: “ My work has never been a 9 to 5. It’s always been the way I live my life, the way I want the world to be. At the grocery store, if I see someone can’t afford groceries, I’ll help them with my organizational hat on. My community is who I want to get free with, and it can be hard to draw those boundaries. Sometimes I really really do need a break.” Defining boundaries that work for each staff person is a leadership skill, and supporting staff to do so and setting an organizational culture that makes this possible is a management skill.

5. As with all culture change, it takes leadership development. And leadership needs to set the tone. As with boundary work, equipping staff with the skills, stance, and tools needed to tend to their own well-being is leadership development. One organization talked about how staff initially were hesitant about their first official organizational recess and also wary of receiving a wellness stipend. It was important for them to be “intentional to show our staff what wellness means - give them examples.” In order for staff in any role to contribute to a culture that supports well-being, it takes shared expectations and practice, and also developing the leadership and skill of all staff as leaders.

It also takes organizational leadership with the most power - executive leaders, decision-makers, and supervisors - actively modeling having balance and boundaries, slowing down false urgency, and asking for support that they need, while intentionally supporting others.

Leadership development is an ongoing practice and principle, not just a one-time investment. That said, external training and courses can often be valuable. They offer folks working in organizations – in any role – with space for reflection, community of practice, tools, coaching, and/or analysis to fortify their leadership skill and practice, including in support of well-being. Leadership coaching can be another important resource for leaders.

6. Invest in people. Investing in staff is critical to well-being. Make sure they have livable, thrive-able wages, healthcare coverage, and other benefits that support their and their families’ needs.

7. Trust is the foundation. Take time to create the conditions of trust, so that staff are trusted and supported to do their work as well as tend to their well-being, and ensure that staff feel this trust. Trust and authentic relationships are core to organizational cultures that support staff well-being. This is especially so, because participants noted that staff entering organizations can carry in past workplace trauma. When workers, especially young, LGBTQ+, and/or people of color experience mistreatment and exploitation in other workplaces, it can affect their relationship to a new organization in ways that impact culture, relationships, and trust more broadly. Any given staff person can have different internalized responses to past workplace trauma; they can show up as mistrust of the organization and leadership, and also they can show up as overworking and overextending. These are some of the reasons why concrete actions for trust and relationship-building – paired with making expectations and values explicit – are important.

8. Equity isn't equal: center the people most impacted. These organizations noted that systemic oppression and trauma impact communities differently. For example, the impact of defending against legislative attacks on transgender people – including young people – lands in a particular way on staff organizers who are themselves transgender. They noted that the disproportional impact can and should be accounted for in how care and wellbeing resources are made available to staff.

9. Safety is a core part of well-being. Safety both within the communities in which staff live and work and within their organizations can be critical to staffs' ability to experience well-being at work. This is especially true when staffs' roles and visibility can make them targets of harassment, stalking, and other types of violence. Community safety should be implemented in ways that align with organizational and community values – for example, with abolitionist principles, for those organizations who seek to create safety outside of policing and carceral systems. [Vision Change Win](#) defines community safety as encompassing: “security, office and organizational safety, verbal de-escalation, physical de-escalation, personal safety, transformative justice processes, community safety neighborhood strategies, bystander intervention, and cop watch.”

Challenges

Some challenges to integrating well-being could include:

- Not enough explicit prioritization and commitment to healing in the organizational culture and/or by decision-makers.
- Lack of or limited resources to support well-being practices and strategies - including funders' unwillingness to fund what this work requires.
- “Urgency addiction,” which can come from a sense of accountability to respond to community needs but impacts balance, sustainability, and well-being. This can especially be an issue if organizational decision makers' and managers' stances are rooted in urgency addiction.
- Organizational leadership absorbing the impacts of emergent or urgent needs in order to support other staff members' well-being, at the cost of their own.
- Lack of access to culturally-competent practitioners (for mental health, wellness, trainings).
- Consistent external threats that impact the communities that organizations organize, serve, and are a part of.

Strategies for supporting staff well-being: Organizational practice, policy, and culture

When Freedom Inc, UNIDOS, and GSAFE shared their organizations' approaches to supporting staff well-being, they surfaced three sets of strategies:

- Organizational practices, or regular actions and habits that support staff to embody well-being together
- Organizational policies and systems, which ensure that well-being is integrated into staff's material conditions, systemically and equitably
- Organizational culture, or the nature of relationships, trust, communication, and belonging

In the table below are summarized specific tools and tactics in each of these categories. It is important to note a couple of things:

First, not all organizations are implementing all of these practices, policies, and aspects of culture – not uniformly across the three that participated in dialogues, nor is it the expectation that any given organization do so. Each organization has different needs, contexts, and access to resources. This table is offered as a “menu of possibilities,” in order to support other organizations to envision what embodying the above values and principles *could* look like materially.

Second, the three categories are not separate from each other. Practices support the deepening of culture. Policies and systems help ensure that practices are consistently and equitably held. Culture, trust, and relationships make the space possible for all of this.

Organizational Practice	Organizational Policy & Systems	Organizational Culture, Relationships, and Trust
<p>Relational & mutual support practices</p> <p>Making space for debriefing and supporting each other on difficult cases/situations</p> <p>Regular habits of checking in on a personal level and building community – in one-on-ones, for full organization</p> <p>Programming</p> <p>Group mental health support provided for full staff, facilitated by trained providers</p> <p>Programming staff activities such as somatic and body work, healing workshops, drumming, personality tests, vision boards</p> <p>Political education around healing and wellness</p> <p>Making resources available to staff to support their whole selves and wellness needs – financial advisors, e.g.</p> <p>Regular social gatherings for staff – potluck lunches, regular walks, e.g.</p> <p>Humanized “built” spaces</p> <p>Healing & reflection room, ability to personalize offices, having access to private</p>	<p>Compensation and benefits</p> <p>Generous compensation (above market)</p> <p>Comprehensive benefits: family health coverage, inclusive parental leave, PTO to include mental health/wellness time, childcare stipends</p> <p>Stipends to staff to use for self-care, wellness, healing</p> <p>Policy for compensated sabbaticals at regular intervals</p> <p>“Healthy transition” support for when a staff member leaves – including resources to be able to take a rest before the next phase of their work</p> <p>Ability and support to bring pets and children to work, in accordance with organizational agreements and individual needs</p> <p>Scheduling and time agreements</p> <p>Established organization-wide recesses, in addition to PTO, e.g. organization closes two weeks twice a year or one week quarterly.</p>	<p>Cultivating conditions for trust and open communication</p> <p>Skillfulness around boundaries</p> <p>Making the implicit explicit for shared expectations (see also role clarity in Policy & Systems)</p> <p>Encouragement and normalization of therapy, mental health support</p> <p>Organizational leadership (decisionmakers, supervisors) model commitment to their own wellness and boundaries</p> <p>Grounding in indigenous and/or community-specific healing traditions and values</p> <p>Lifting up and studying the wellness practice of movement legacies and ancestors</p> <p>Having a leadership development strategy for staff, incorporated into organizational culture and supervision practice, that supports each team member to connect their own story of self to the organization’s theory of change and build relationships with each other in doing so</p> <p>Modeling and supporting self-reflection and</p>

<p>space for decompressing - esp for folks who work in shared/open offices, snack bar</p> <p>Time & priority management (to mitigate urgency culture)</p> <p>Protocol and risk assessment to discern when/how to respond to emergent, urgent needs in the community</p> <p>Strategy and prioritization</p> <p>Forecasting opportunities and threats on horizon, their impact on staff workload and wellness, and proactive priorities for supporting sustainability and well-being</p> <p>Budgeting for well-being and seeking dedicated resources for it</p> <p>Safety planning, including political education and strategy work on defining safety, assessing organizational risks and safety needs (can be done with consultant support), developing safety plans, implementing community safety teams, resourcing safety practices</p>	<p>Flex time to be able to adjust schedules for work outside regular work hours and on weekends.</p> <p>Flexible scheduling to allow for exercise, food, care during work day</p> <p>Care and respect for each other in calendaring to respect meals and care needs, as well as breaks between meetings</p> <p>Role clarity and transition planning</p> <p>Clear, accurate, regularly updated job descriptions</p> <p>Succession and leadership transition planning</p>	<p>assessment - of impact on each other and on organization, of performance and leadership. This can include succession and leadership transition planning.</p>
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Some additional resources

Tools

- [My Healthy Organization](#), a tool created by Roadmap Consulting to assess organizational culture and relationships alongside programs, strategies, capacity, and values (sliding scale \$0-250/org)
- [The Embodiment Institute](#) offers self-guided courses and online spaces to support leaders and organizations to connect movement work with healing, through deepening understanding and awareness of embodiment
- *The Fearless Organization* by Amy C. Edmondson, a book about creating psychological safety in the workplace
- [Vision Change Win](#) is a consulting firm that both supports organizations' values-driven development and offers trainings series on community safety and conflict transformation
- Leadership development trainings and retreats:
 - [Rockwood Institute](#)
 - [Black Organizing for Leadership and Dignity](#)
 - [The Management Center](#)
 - [Rev. angel Kyodo williams](#)
 - [Strozzi Institute](#)
 - [Windcall Institute](#)
 - [Center for Courage and Renewal](#)
 - [Courage of Care](#)
 - [Anima Leadership](#)
 - [Nzuzu Consulting](#)
 - [Institute for Collective Wellbeing](#)
- Coaching resources:
 - [generative Somatics practitioner network](#)
 - [Blooming Willow Coaching](#)
 - [Coaching for Healing, Justice, and Liberation](#)
 - [Roadmap Consulting](#)
 - There are many other resources to find a coach. This is just a few.

References

- [Personal ecology](#) as part of Rockwood Leadership Institute's definition of leadership

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- Understanding and tending to **secondary trauma** (also called carer’s trauma or vicarious trauma) - particularly in anti-violence work ([Trauma Stewardship Institute](#))
 - **Healing justice**, defined as “a political strategy of collective care and safety that intervenes on generational trauma from systemic violence and oppression” (by Cara Page and Erica Woodland, authors of [Healing Justice Lineages](#))
 - **Politicized somatics and embodiment** to “build and practice liberatory culture” ([The Embodiment Institute](#))
 - **Just labor conditions** in movement workplaces, from the perspective of [nonprofit labor organizing](#)

Background on CORE’s work and partnership with UNIDOS, Freedom, Inc, and GSAFE

Field for well-being

CORE began in 2010 as a project to bring nonprofit leaders, consultants, and funders together to improve the way we work for change. Over the years, inspired by other efforts around the country, CORE has experimented with a variety of programs to build the field of transformational change in South Central Wisconsin. Most recently they have focused on funding and accompaniment to support social and environmental justice organizations working to shift their practices and culture towards individual and collective well-being.

Resourcing UNIDOS, Freedom, Inc, and GSAFE

This Partner Exchange was built on 10+ years of relationship between people at CORE and leaders of color in these three important organizations in our community. In addition to successfully empowering marginalized communities, these organizations have worked intentionally on improving staff well-being, in part with support from CORE.

The process for generating the principles and practices in this report

CORE offered GSAFE, UNIDOS, and Freedom, Inc. the opportunity to convene in facilitated dialogues to share and learn from each other about supporting staff holistic well-being. The organizations agreed and worked with Julie Andersen to identify their goals to be:

- Providing opportunities to reflect on and acknowledge the work they’re doing.
- Cultivating connections among people doing this work so they can support and learn from each other.
- Learning from these organizations and facilitating ways of sharing those learnings with others in the broader CORE network.

Participants in the gatherings included: Rae Sowards and Sue Neeley (GSAFE); Bianca Gomez, Chai Moua, and Sheur Yang (Freedom, Inc); Fanya Valencia, Jhonatan Real Merio, and Lucia Ledesma (UNIDOS).

They met twice, with the support of facilitator Cynthia Lin, in one daylong and one half-day gathering. Through a mix of relationship- and community-building, creative, and small- and large-group dialogue processes, they took up the questions:

- What does staff well-being mean to us?
- What does it look like in practice?

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- What does supporting staff well-being make possible?
 - What conditions support staff well-being and healing to be part of your work sustainably?
 - What are obstacles?
 - What do you long for?

They also engaged in mutual support and peer coaching processes, each organization identifying a specific strategy question or a goal for the future, sharing with the group, and getting feedback and support. They also shared concrete how-tos, tools, and templates with each other. One important outcome of these gatherings was a shared commitment for ongoing gatherings, to continue discussing, reflecting, learning from, and supporting each other, which CORE will continue resourcing. The three organizations found partnership with other organizations to be something they had needed more of in their multi-year work on staff well-being, and an important ingredient to sustainable and successful practice.

About the facilitator

[Cynthia Lin](#) is a Madison-based consultant specializing in facilitation and training; program and curriculum design; organizational development and values-driven practice; and creating processes rooted in design thinking that foster strategic clarity, deepened relationships, and transformative practice. She is a student of somatics and healing justice. Cynthia served from 2016 to 2023 on the leadership team of the National Network of Abortion Funds, including much learning and practice about supporting the sustainability and wellness of organizational staff and network leaders, drawing from principles and practices about values-driven organizational systems, worker justice, community care, and healing justice. As a young organizer, Cynthia was developed as a leader by organizing in grassroots groups in Madison, including with Freedom, Inc.