



## APPENDIX - LECTURES AND TRAININGS

### Lectures

**Presenter:** Jason Schlatter

**Audience:** 10 Minimum – 500 Maximum

**Time:** 1 - 1.5 hours depending on topic and scope

**Cost:** includes prep, adaptation, Q&A, with added 1 hour workshop for case studies

#### *Titles:*

Bouncing Forward – Theory & Practice of Post-Traumatic Growth  
Collective Impact – The Definitions, Strategies, Pearls, and Pitfalls of Working Collectively  
Community Engagement – Strategies for Connecting Internal and External Stakeholders  
Design Thinking – Comprehensive Approach to Case Management  
Intercultural Communication & Relationships – Definitions and Understanding  
Intergenerational Leadership – Your Resource for Increased Organizational Effectiveness  
Strategic Planning – Theory & Frameworks From Purpose to Succession Planning  
Social Capital – How to Make the Most Out of Your Relationships

### Trainings Menu

Equity in the Workplace

Maximizing Efficiency in Virtual Teams

Mental Health – De-Escalation and Mental Health Issues in Client Services

Performance Management

Personal Financial Wellness – Financial Literacy Training for Adults/Employees

Personal Financial Wellness – Financial Literacy Training for Youth: First Job to First Career

Professional Communication Skills

Services to Youth

Strengths Finder

\*All of the above can be tailored to specific client needs and focus. Purchase of two or more lectures or trainings by the same client grants a discount of up to 20%.

### Trainings Specifics

#### **EQUITY IN THE WORKPLACE**

**Presenter:** Candice Dickens-Russell / Jason Schlatter

**Audience:** 10 Minimum - 50 Maximum

**Time:** 1 Workshop / 4hrs or Available in 2 Consecutive Workshops (edited as suggestion to allow for smaller webinar versions - adjust as needed)

An introductory course to the concepts of equity diversity, and inclusion. How is equity defined and practiced in the workplace and daily life? What policies and systems must be present to begin to realize the various types of equity? The course will explore best practices, challenges, and workplace strategies to intentionally build equitable spaces within the workspace to maximize an organization's effectiveness and strength.

#### Outline:

1. Why equity and equality are not the same thing
2. Why equality policies fall short
3. Equity beyond labels
4. What equitable spaces look and feel like
5. Who is responsible for equity

#### Goals and Objectives :

1. Increase awareness of equity issues.
2. Explore equitable policies and environments
3. To provide strategies and implementation systems for increasing equity for all identities.
4. Concludes with a framework for building an equity focused task force to help lead future discussions and initiatives

### **FACILITATION TRAINING**

**Presenter:** Candice Dickens-Russell / Jason Schlatter

**Audience:** 10 Minimum - 15 Maximum

**Time:** 1 Workshop / 4hrs or Available in 4 Consecutive 1hr Workshops

Effective facilitation is a balance of preparation, flexibility, and active self-awareness. This course combines established facilitation techniques with innovative strategies for workflow, timing, and personality management. The course also gives focus to the internal awareness and emotional intelligence needed for facilitators to build trust, co-create environments, and support the work of the group. From a facilitator's literal bag of tricks to back-pocket contingency plans, this course will ensure optimal preparedness.

#### Outline:

1. Proven facilitation strategies
2. Next generation facilitation strategies
3. Managing personalities
4. In your bag
5. Pitfalls and situations to avoid
6. Know yourself, know others, & work effectively within that difference

#### Goals & Objectives

1. How to incorporate traditional and non traditional facilitation techniques
2. Practical tools and resources every facilitator should have
3. Honoring appropriate boundaries and calling out dysfunction
4. Problem solving and avoiding conflict as a facilitator

Takeaway includes program materials.

### **MAXIMIZING EFFICIENCY IN VIRTUAL TEAMS**

**Presenter:** Raffi Aslanian, PsyD

**Time:** 1.5 hours

**Number of Participants:** 20 maximum

This course is designed to improve your management and facilitation skills in virtual teams. While virtual work is common, it is an entirely new way of working for many. We are human and have innate needs for socialization and interaction. In aligning with practicing distancing and in building new skills, we must adapt to new ways of working. Particularly for those who are working from home for the first time, it is an adjustment. It may take a moment to find a setup and rhythm that works for you. Both at the individual and group levels and it can certainly be done!

In this course, you will build new skills and practices in running engaging virtual meetings. This course will provide you with practical methods in facilitating virtual meetings that are highly productive.

Additionally, understanding the benefits of virtual meetings can help you and your teams with adopting a new way of working. Some of the benefits include the efficiency it creates for all members to connect from practically any location and save time. Virtual meetings can also result in significant reduction in costs for organizations, along with a reduction of environmental impact.

If done right, by incorporating practices, processes, and structure to virtual meetings can help us adapt quicker to changes and allow teams to efficiently and effectively reframe how we look at new ways of working.

Open to anyone, this course can be suitable for managers, supervisors, frontline employees, human resources professionals, undergraduate, or graduate students interested in developing or enhancing skills in managing virtual teams.

#### *Topics and Course Content:*

- Adapting to Quicker Changes
- It's all in the Prep – Review processes and steps to best prepare the experience
- Inclusion- Deliberate practices to humanize meetings and maintain emotional connections
- Facilitation Skills
- Elevating the Engagement

Takeaway includes program materials.

### **MENTAL HEALTH – DE-ESCALATION AND MENTAL HEALTH ISSUES IN CLIENT SERVICES**

**Presenter:** Elke Rechberger, PhD (Independent Contractor)

**Audience:** Service Providers & Supervisors, 10 attendee minimum, 50 maximum attendance

**Length:** 4 hours

#### PART I - Description of Section (2 hours):

A body of research literature has been growing in the past three decades that documents the comorbid prevalence of mental health and substance abuse disorders in direct social service community-based organizations. This section is designed to increase staff awareness about various signs and symptoms of key disorders, so as to help increase discernment between client resistance to behavioral change, versus need for appropriate referral to other adjunct community services for more intensive clinical treatment.

#### *Outline:*

1. Overview of primary mental health disorders, and key symptom identification
2. Overview of primary substance abuse disorders, and key symptom identification
3. Research review on trauma, and how PTSD interferes with successful client treatment engagement and retention

#### *Goals and Objectives:*

1. Increase proper identification of mental health & substance abuse disorders for additional clinical referral and treatment
2. Learn to identify trauma in clients, and develop organizational strategies to increase staff and client safety, and reduce triggering environments and interventions.

At the conclusion of the plenary, the participant should be able to identify symptoms of various comorbid health disorders, and list at least 3 organizational strategies to reduce their effects.

#### PART II - Description of Section (2 hours):

This section is designed as practical skills building for all participants.

#### *Outline:*

1. Learn grounding techniques, to assist clients to de-escalate when triggered

2. Learn 80+ healthy safe coping strategies
3. Learn 15+ common cognitive distortions, and how to respond differently
4. Dissemination of resources

*Goals and Objectives:*

1. Participants will be able to list 4 active coping strategies to help clients better cope with daily life stressors in healthier ways.
2. Participants will be able to utilize 3 different grounding methods to de-escalate clients

At the end of the workshop, participants will be able to utilize at least 4 new active coping strategies and 3 grounding techniques with clients. Takeaway includes program materials. Takeaway includes program materials.

**MENTAL HEALTH – WHEN HELPING OTHERS HURTS YOU: STRATEGIES FOR RESOLVING VICARIOUS TRAUMA**

**Presenter:** Elke Rechberger, PhD

**Audience:** Professional Service Providers, 10 minimum attendees, 50 maximum attendance

**Length:** 4 hours

PART I – Description of Section (2 hours):

A body of research literature has been growing in the past two decades that documents the emergence of vicarious traumatization in professionals, particularly those in the helping professions. This section is designed to increase participants' awareness about the syndrome, as well as identifying intervention strategies to help reduce vicarious traumatization symptoms in staff and organizations.

*Outline:*

1. Overview of research
2. Description of 5 core self/other areas affected by vicarious traumatization
3. Review of vicarious traumatization symptoms in 7 inter/intrapersonal domains
4. Strategies for mitigating vicarious traumatization in staff
5. Organizational responses to vicarious traumatization to minimize staff harm

*Goals and Objectives:*

1. Increase awareness about and proper identification of vicarious traumatization symptoms.
2. Provide strategies for organizations to implement as a means of reducing vicarious traumatization perpetuation in their colleagues and support staff.

At the conclusion of the plenary, the participant should be able to identify symptoms of vicarious traumatization, and list 3 organizational strategies to reduce its effects.

PART II - Description of Section (2 hours):

This section is designed as an experiential and interactive session for all participants. Practical application of strategies to reduce vicarious traumatization in oneself is the primary focus of the session. A model for conceptualizing the development of vicarious traumatization and dissemination of resources to enhance coping skills will also occur.

*Outline:*

1. Self-assessment of vicarious traumatization symptoms
2. Presentation of model on the development of vicarious traumatization
3. Intra/interactive journaling & small group work (on five core self/other needs)
4. Presentation of coping strategies
5. Dissemination of resources

## Goals and Objectives:

1. Participants will be able to list 4 active coping strategies to reduce the effects of vicarious traumatization in their lives.
2. Participants will have access to a number of resources to access ongoing developments in vicarious traumatization assessment tools and research developments.

At the end of the workshop, participants will be able to list 4 active coping strategies to reduce the effects of vicarious traumatization in their lives. Takeaway includes program materials.

## PERFORMANCE MANAGEMENT SERIES

**Presenter:** Raffi Aslanian, PsyD & Jason Schlatter

**Hours:** Total of Four 4-hour sessions

**Number of Participants:** Minimum 10, Maximum 20

**Includes:** DiSC Assessment

This interactive course is designed to improve *Communication Skills & Performance Management for Leaders*. Participants start with an assessment (\*DiSC) to build self-awareness on their communication styles and behavioral tendencies. This course will then provide practical frameworks for feedback and coaching, which are essential in driving effective communication. This includes a common understanding, language, and tools for participants to apply on the job.

### Class 1: Intro to Communication & Performance Management

1. Setting the stage – Course purpose, objectives, and expectations.
2. Emphasis on link between Performance Management, Feedback, Coaching
3. Obligations of a leader
4. Building blocks activity and debrief
5. DiSC Assessment – Start with self-awareness of communication style and tendencies

### Class 2: Feedback and Coaching

1. Introduction of feedback and coaching framework
2. Activities to better understand effective/ineffective feedback and coaching
3. Overcoming barriers to feedback and coaching
4. Application of coaching and feedback framework

### Class 3: Performance Management

1. What does it mean to be a leader
2. Driving management accountability
3. Review of Performance Management process, timeline, and expectations
4. Leverage tools and resources for effective performance management

Class 4: The topics covered in this class will be determined based on the needs of participants. Classes 1, 2, & 3 will help uncover developmental areas most pertinent to participants.

\*The DiSC assessment measures our natural preferences, behavioral tendencies, and why we behave in certain ways. Understanding our work-related behaviors builds stronger knowledge in applying them in our day-to-day, particularly in critical-thinking, decision-making, and problem-solving. As participants grow familiar with their own style, the next objective is gaining awareness of other DiSC styles to flex our behaviors and increase performance. The DiSC assessment is designed for audiences to understand interpersonal dynamics in practical ways and offers actionable recommendations for you and others who interact with you. Takeaway includes individual's DiSC Assessment and program materials.

## **PERSONAL FINANCIAL WELLNESS – FINANCIAL LITERACY TRAINING FOR ADULTS/EMPLOYEES**

**Presenter:** Bryan Schwartz, CFP

**Audience:** Adults

**Class Size:** 10 person minimum class size, 15 ideal, 30 maximum class size

**Length:** 6 sessions at 1-2 hours apiece

These workshops will provide dynamic, value and goal-based personal financial education which seeks to foster financially capable adults regardless of income level or individual goals. At its core, participants will address and understand their personal relationship with money by addressing their history with money, its value and purpose as a tool, in order to make smart money decisions.

This workshop can be presented in either 1-2 hour topic-based sessions or an entire series of 6 one-hour workshops covering the following topics:

- Your Money Mind
- Personal Banking & Budgeting
- No Debt About It (Credit & Debt)
- The ABCs of Insurance: Life, Health, & Medical
- Feed Your Future: Investing & Saving
- Your Money & Uncle Sam: Taxes

### *Goals and Objectives*

Participants will:

- Assess and understand their personal relationship and connection to financial resources and how that affects their view of money and personal decision making.
- Develop a personal spending/saving plan through various cash flow strategies.
- Review banking and online tools for effective/efficient personal money management.
- Create a debt reduction plan for eliminating consumer, student loan, and mortgage debt.
- Assess their current risk protection plan for life, health, and disability.
- Learn about options for investing for retirement, higher education, and long term savings/accumulation.
- Review tax planning strategies for minimizing tax liability.

Takeaway includes program materials.

## **PERSONAL FINANCIAL WELLNESS – FINANCIAL LITERACY TRAINING FOR YOUTH: FIRST JOB TO FIRST CAREER**

**Presenter:** Bryan Schwartz, CFP

**Audience:** Young Adults 15-25 years of age

**Class Size:** 10 minimum class size, 15 ideal, 30 maximum class size

**Length:** 6 sessions at 1-2 hours apiece

Young adults are rarely equipped to make smart financial decisions. While there are large amounts of financial literacy resources, very few young adults are presented with the tools and resources in a meaningful way during their secondary education. These workshops will provide dynamic, value and goal-based financial education which seeks to foster financially capable first job to first career young adults regardless of income level or individual goals. At its core, participants will address and understand their personal relationship with money by addressing their history with money, its value and purpose as a tool, not as an end goal.

This workshop can be formatted for youth or young adults (1st job to 1st career) in either 1-2 hour topic-based sessions or an entire series of 6 one-hour workshops covering the following topics:

- Your Money Mind, Financial Goals & Budgeting
- Economics, Current Events, & How They Impact You
- Credit & Managing Debt
- Career Connections & Earning Power
- Preparing for College (Life After College)
- Protect What You Have

## Goals and Objectives

Participants will:

- Assess and understand their personal relationship and connection to financial resources and how that affects their view of money and personal decision making.
- Understand the importance of tracking spending and be able to develop a budget.
- Be able to interpret economic/market news and how it relates to their personal financial decisions.
- Understand the basics of credit and debt and be able to assess best practices for its proper use for future opportunities.
- Evaluate career/job earning potential.
- Evaluate college/higher education funding options.
- Learn practical tips for avoiding common financial pitfalls and evaluate personal goals/priorities in controlling financial decisions.

Takeaway includes program materials.

## PROFESSIONAL COMMUNICATION SKILLS SERIES

**Presenter:** Raffi Aslanian, PsyD & Jason Schlatter

**Hours:** Total of Six 4-hour sessions

**Number of Participants:** 20 maximum

**Includes:** DiSC Assessment for each participant

This course is designed to improve Communication Skills across various modes, which include individual, group, or technologically-based interactions. Particularly in a world with reliance on rapidly expanding technologies, building effective and professional communication skills require a set of skills to achieve desired outcomes. Participants start with an assessment (\*DiSC) to build self-awareness of their own communication styles and their impact on others. Students will highlight common barriers to effective communication, while exploring fundamental skills and tools to enhance verbal, written, and presentation skills.

Open to anyone, this course can be suitable for managers, supervisors, frontline employees, human resources professionals, undergraduate, or graduate students interested in developing or enhancing professional communication skills.

## Topics and Course Content:

- Going Beyond Words – Skills Needed for Effective Communication
- It Starts With YOU – Building Self-Awareness and Impact on Others Through DiSC
- Building Interpersonal Skills Through Active Listening
- Accelerate Alignment Through Verbal, Written, and Presentation Skills
- Demonstrate Professionalism in Various Settings (e.g. Work, Home, Digital)

## Learning Goals and Results:

At the conclusion of the course, participants will be able to:

- Better understand what effective communication means in today's world
- Build awareness on various communication styles, techniques, and processes (DiSC)
- Follow email etiquette and written communication techniques
- Improve business writing skills in areas such as business letters, proposals, filling forms, agreements, business emails, etc.
- Learning ways to flex and adapt your style based on your audience
- Develop communication skills, including verbal, nonverbal, listening, and preparation
- Apply appropriate methods of communication for various modes of delivery (verbal, email, instant messenger, social media, meeting etiquette, presentations, etc.)
- Understand cultural implications on communication styles
- Recognize professional communication as a reflection of self and their organization

\*The DiSC assessment measures our natural preferences, behavioral tendencies, and why we behave in certain ways. Understanding our work-related behaviors builds stronger knowledge in applying them in our day-to-day, particularly in critical-thinking, decision-making, and problem-solving. As participants grow familiar with their own style, the next objective is gaining awareness of other DiSC styles to flex our behaviors and increase performance. The DiSC assessment is designed for audiences to understand interpersonal dynamics in practical ways and offers actionable recommendations for you and others who interact with you. Takeaway includes individual's DiSC Assessment and program materials.

### **SERVICES TO YOUTH**

**Presenter:** Candice Dickens-Russell

**Audience:** 10 Minimum - 50 Maximum

**Time:** 1 Workshop / 4hrs or Available in 2 Consecutive Workshops

Building programs that serve youth require careful analysis and direct youth input. Beyond meeting youth where they are, we explore creating programs and services that address where they want to be, meet real and established community needs, leverage partnerships, and are sustainable for maximum impact.

#### *Outline:*

- a. Determining the true audience
- b. Incorporating youth voice
- c. Building strategic partnerships
- d. Creating meaningful experiences and lasting impact
- e. Empowering youth leaders

#### *Goals and Objectives:*

Understand the goals of youth programs

Explore successful youth programs

Establish concrete steps for engaging and empowering the youth audience

Provide strategies for long term sustainability

Takeaway includes program materials.

### **STRENGTHS FINDER**

**Presenter:** Raffi Arslanian, PsyD

**Audience:** 10 Minimum - 40 Maximum

**Time:** 4hrs or Available in 2 Consecutive Workshops

In this course, students will use a tool to develop a better understanding of their strengths. They will complete the Clifton StrengthsFinder assessment to jump-start their journey of discovering their inherent strengths, along with how it impacts others. The dimensions of strengths that participants are measured on include: Executing – Influencing – Relationship Building – Strategic Thinking. This will be an interactive session to better understanding your signature themes, apply your strengths, and maximize your potential. This course is designed for managers, supervisors, human resources professionals, undergraduate, or graduate students interested in discovering their natural strengths to enhance the application of personal strengths and leadership development.

#### *Topics and Course Content*

- Understanding Strengths and Recognizing Their Value – Positive Psychology
- Why Strengths Are More Important Than “Weakness”
- Understanding Your Unique Strengths
- Leveraging Strengths - At Work and At Home
- Find Ways to Align Strengths With Opportunities
- Strengthening Relationships



### *Learning Goals and Results*

At the conclusion of the course the participants will learn:

- The paradigm of positive psychology is as it relates to our talents
- How combining natural talents with additional knowledge and skills provides increased engagement and consistency in performance
- A deeper understanding of their own unique strengths through the StrengthsFinder Assessment to increase awareness of inherent abilities
- How to apply their strengths to best complement their work in achieving goals and objectives
- Methods to increase team performance, engagement, and culture by focusing on strengths
- To build common language and drive effective communication (e.g. Team culture, performance reviews, difficult conversations, etc.)
- The value of strengths in others to better align and harness the collective talents on a team (Talent Team Grid)

Takeaway includes processing and delivery of individual's Clifton Strengths Finder assesment and program materials.