

# Survivor Leaders & Subject Matter Expert Capacity Building Project

Phase I Summary Report | June 2022

*Heather Caillier, President & Principal, Ascend Consulting, Inc.*



# Collaborative Partner Acknowledgments

People with lived experience were identified and invited to participate in this project based on their professional expertise, past professional consulting experiences, and their expressed interest in becoming subject matters experts for the Minnesota Department of Health Safe Harbor Program.

*This project was developed and led by Heather Caillier, President of Ascend Consulting, Inc.*  
*heather@ascendconsultingmn.com | www.ascendconsultingmn.com*

Thank you to these incredible leaders who took time out of their busy lives to share their wisdom and expertise to help support other survivors.

## **Lindsay Arf**

Advocate and Breaking Free Safe Harbor Consultant  
*Lindsay.Arf2018@gmail.com*

## **Lateesha Coleman**

Founder of Survivor's for System's Change and Manager of Survivor Leadership at Rainbow Research  
*Lcoleman@rainbowresearch.org*

## **Joy Friedman**

Survivor Leader and Subject Matter Expert  
Founder and CEO, The Missing P.E.A.C.E. (Promoting Education, Awareness & Community Engagement)  
*joyfriedman777@yahoo.com*

## **Monica Miller**

LSW/Survivor Advocate  
CHUSE-Creating Hope & Unity for Survivors of Exploitation  
*m.miller@chusemn.org*

## **Bukola Oriola**

Former Member, U.S. Advisory Council on Human Trafficking  
Executive Director, The Enitan Story  
*www.enitan.org*  
*info@enitan.org*

## **Chris Stark**

Organizer and Author  
*www.Christinestark.com*  
*christine@christinestark.com*

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## **APPENDIX**

**Recommendations for Engaging with Survivors as Speakers and Consultants – Tip Sheet for Agencies, Systems, Faith Communities, and other Community Groups/Members**

**Resource Toolkit: Tools, Templates and Resources for Survivor Leaders and Subject Matter Experts**

# Background

For decades, trafficking survivors have been advocating for change in the engagement practices (or lack thereof) of Survivor Leaders and Subject Matter Experts in the anti-trafficking field. While strides have been made to center the voices and leadership of survivors in the work, improvements, education, and the development of best practices are needed to effectively and respectfully engage, employ, contract, and fairly compensate survivors for their invaluable contributions. As one survivor shared, “There is no amount of money that will compensate for our experiences.” As systems and professionals working with and engaging survivors, there are policies, practices, and trainings that can be put in place, as well as tools and resources that can be developed to support survivors who choose to become involved in anti-trafficking work. These resources can reduce re-exploitation and re-traumatization experienced by survivors and ensure that other professionals engaging with them are properly trained. However, many organizations and systems are still at a loss for how to strategically utilize survivor expertise in the development of policy and programming, as well as how to support survivors’ professional development.

This project originated in response to consistent feedback by survivor leaders throughout the recent 2022 Virtual Safe Harbor Conference, through various breakouts, discussions, and most notably, a courageous keynote presentation by organizer and author, Chris Stark. In other sessions, survivors also spoke about their frustrations with the barriers they consistently encounter when working in the anti-trafficking field as speakers and consultants.

## Language and Terminology

Words matter. Labels matter. Some survivors expressed concern about the use of the terms “experts, victims, survivors, leaders, professionals, thriver not survivor”, and feel that it is critically important not to put these titles and/or labels on them or other survivors. The participants agreed that terms and labels can create a hierarchy and separateness between survivors. Each survivor has a unique experience and should be allowed to self-identify (or not) and choose their own titles and find their own role in this work—including choosing not to contribute as a consultant or speaker professionally, and still hold the same value as a survivor.

For this report, the terms “Survivor Leaders” and “Subject Matter Experts” are being used interchangeably, though these terms had different meanings to the six survivors in this group. It should be noted that a shared understanding of “subject matter expert” refers to someone with lived experience on a specific topic doing professional work (i.e., survivors who are out of the life and working professionally as consultants and speakers rather than engaging clients who are still in a program).

## Other Important Considerations

It should not be assumed that the opinions, recommendations, training, and skill development needs identified during this process are reflective of all survivors. They only represent the participants feedback, and my own (Heather Caillier) experiences in working with survivors for the past 14 years.

It is also critically important to note that there are cultural considerations that must be addressed when developing any training or resources for wide audiences. As one survivor shared, “There are different ways of relating and moving in this work. As an example, working with and serving fellow relatives in the Native community, and a priority to go about our work with great humility.”

Additionally, there is a vast chasm of understanding about culture, class, and money as it relates to engaging survivors. There is a lack of understanding about compensation and putting a monetary value on a survivor's time, as well as having unrealistic expectations (a class issue) around being reimbursed for travel and lodging, providing day care, access to technology, and covering other costs associated with doing the work. These costs are not typically accounted for in an hourly fee or considered by professionals who are doing this work as their full-time job with benefits.

There's also the inherent power dynamic at play when it comes to compensation (who holds the purse strings, and does the payor agency or organization have practices in place that explicitly make room for survivors to negotiate, set limits, etc.) A contract for hire carries different context depending on a person's lived experience. Agencies also need trauma-informed practices that empower Survivor Leaders and Subject Matter Experts to co-create the terms of their engagement.

## Project Scope & Summary

**Goal:** To facilitate a series of listening sessions with survivors of human trafficking that will result in the development of tools, resources, and a project summary report with suggested next steps to increase the consulting capacity of Survivor Leaders and Subject Matter Experts of human trafficking in Minnesota.

**Process:** Phase I occurred in June of 2022 and included contracting with six diverse survivors of human trafficking who had previous consulting and/or public speaking experience to provide consultation and expert insight into the planning and development of tools, resources, and recommendations to increase the consulting capacity of Survivor Leaders and Subject Matter Experts in human trafficking in Minnesota.

Three listening sessions with survivors were conducted via Zoom to learn more about their experiences, needs, and recommendations to develop helpful tools and resources as they navigate this work, as well as training recommendations for both survivors and professionals.

Participants also provided review and feedback of documents via email in between and at the close of the project. Survivors were compensated at \$850 for 10 hours of work.

### **PROJECT DELIVERABLES:**

- Identify barriers to presenting and consulting, and professional needs, skills and tools that would be helpful in removing these barriers (needs assessment).
- Research other existing tools and resources that may be available (survivor-led initiatives).
- Identify coaching topics and public speaking/consulting best practices.
- Identify trauma-informed self-care for survivors before/after consulting opportunities.
- Create a resource toolkit of new and existing resources – sample contracts, email communications, etc. to help empower survivors to move forward professionally as subject matter experts.
- Develop a tip sheet for agencies and people requesting presentations and/or consultation from Survivor Leaders and Subject Matter Experts – policies, processes, payments etc. clear communications when working with survivors.
- Provide a summary report and plan for implementation of future trainings including a cost analysis.

# Training Recommendations Outline

It was determined that to be most effective, training should be developed for two distinct audiences—  
Primary: Survivor Leaders and Subject Matter Experts (including those who are aspiring to this work);  
Secondary: Professionals and Community Members Who Are Engaging with Survivors as Subject Matter Experts.

**PRIMARY AUDIENCE:** Survivor Leaders and Subject Matter Experts

**Training Summary:** The purpose of this training for survivors of trafficking and exploitation is to introduce general best practices, tools, and resources for survivors in Minnesota to increase their capacity to become professional speakers and/or consultants and Subject Matter Experts in the anti-trafficking field.

**SECONDARY AUDIENCE:** Professionals and Community Members Who Are Engaging with Survivors as Subject Matter Experts

- Safe Harbor Grantees and Partners
- Systems Professionals (Task Forces, policy makers, criminal justice—professionals seeking subject matter input and testimony)
- Faith-based and other Community Groups (Rotary, Women’s Groups, etc.)
- Funders
- Other professionals and community members engaging with survivors

**Training Summary:** The purpose of this training for agencies, systems professionals, faith-based communities, and other community members/groups is to increase awareness of best practices and considerations when professionally engaging and contracting with Survivor Leaders and Subject Matter Experts to reduce re-traumatization and re-exploitation, and begin integrating a practice of engaging survivors in authentic professional partnership and utilizing survivor expertise in a way that results in measurable policy and practice change.

## Training Outlines

The following training outline is not exhaustive and is meant to be a starting point based on the self-identified needs and personal experiences of the survivors engaged on this project.

### I. SURVIVOR LEADERS AND SUBJECT MATTER EXPERTS TRAINING OUTLINE MODULES

#### **Module 1: What is a Survivor Leader/Subject Matter Expert (SME)?**

- Explanation of what a Survivor Leader and Subject Matter Expert is. Your experience makes you an expert. Nobody else is the expert of your lived experience except you.
- Importance of Language and Titles—victim, survivor, leaders, SME’s—hierarchy and “separateness” considerations—everyone has a unique experience
- Finding and defining your own role and self-identification
- Taking on expectations and labels put on survivors by the movement, like “thrivers not survivors”
- Cultural considerations—different ways of relating and moving in this work

#### **Module 2: How are Subject Matter Experts Engaged in the Anti-trafficking work?**

- Examples of consulting, speaking, advising, direct service, advocacy, policy change, task forces, work groups, etc.

- Types of training and presenting requests that are common
- What are other ways survivors can help besides consulting and speaking?

### **Module 3: Working with Systems**

- Working with system professionals and triggers
- What is systems change?
- Power dynamics in the professional world

### **Module 4: Public Speaking and Independent Contractor/Consulting Basics**

- Public Speaking Tips & Recommendations
- Consulting Tips & Recommendations
- Creating an “ideal client profile” and weighing each opportunity—knowing when to say no
- Business Attire and Etiquette
- The client/contractor dynamic and relationship
- Boundaries—making decisions about what to share/when/to who

### **Module 5: Small Business Operations & Administration**

- Technology 101—Microsoft Office, Adobe, Google Business Suite tools, Canva, Website platforms, MAC/iPhone tools, Calendly, Doodle or other scheduling tools
- Resources available to survivors (free)
- Business entity, business registration
- Accounting and tax considerations
- Marketing and Communications (website, email communications, social media considerations, marketing materials and service offerings/pricing information, booking process and tools)
- Educating survivors about unemployment benefits employee vs. contractor (quitting vs. being fired)

### **Module 6: What is Fair Compensation for Survivor Leaders and Subject Matter Experts?**

- Review of compensation best practices and rates, including federal contract rates as a minimum
- Types of payments—cash, check, gift cards (only appropriate if requested by SME), reimbursements
- Other considerations/benefits—making exceptions on pricing when there are other benefits like networking or exposure to other contacts and audiences
- Understanding the market and the client’s budget
- Helpful language for different scenarios in negotiating fees and project deliverables

### **Module 7: Boundaries, Expectations, and Contract Negotiation**

- Understanding funding restrictions and your contracts
- Delivery of final work
- Reporting requirements
- Setting limits and negotiation of contract terms, including renegotiating existing/renewal contracts
- Invoicing
- How to handle “scope creep” for contracted projects (this is when a client adds additional tasks, time, or duties to your existing project or contract)
- Proprietary rights and limited use agreements of work produced
- How to handle contract cancellations

### **Module 8: Are you ready to become a Consultant/Speaker/SME?**

- Self-assessment and readiness considerations
- Trauma and Self-care considerations
- Barriers and skill development considerations
- Being a leader in all areas of your life
- Survivors building up and supporting other survivors—addressing competition and territorial tendencies

## **II. PROFESSIONALS AND COMMUNITY MEMBERS WHO ARE ENGAGING WITH SURVIVORS AS SUBJECT MATTER EXPERTS TRAINING OUTLINE**

### ***Module 1: What is A Survivor Leader and/or Subject Matter Expert (SME)?***

- Understanding who a Subject Matter Expert is (i.e., survivors who are out of the life and working professionally as consultants and speakers rather than engaging clients who are still in a program)
- Importance of Language and Titles—victim, survivor, leaders, SME’s – hierarchy and “separateness” considerations—everyone has a unique experience
- Allowing survivors to find and define their own roles
- Putting expectations and labels on survivors i.e. “thrivers”
- Cultural considerations—different ways of relating and moving in this work

### ***Module 2: Are All Survivors Ready to be Survivor Leaders/Subject Matter Experts?***

- Trauma and cultural considerations when working with SME’s. What are you really asking them to do?
- Is there a recommended criteria for accessing someone’s readiness to be asked to share their story or provide consultation?
- What are the types of work and ways to contract with survivors as subject matter experts?
- What if my request causes relapse?
- Confidentiality, risk, and privacy considerations

### ***Module 3: How To Appropriately Engage With and Contract Services with Survivor Leaders/Subject Matter Experts***

- Fair and clear compensation practices and policies when working with Survivor Leaders/SME’s
- Considerations of proprietary information and limited use of work created by Survivor Leaders/SME’s
- Appropriate Accommodations when working with Survivor Leaders/SME’s
- Intentionally creating space for thought partnership, negotiation, and building in an “out” for potential survivor experts
- Working with Survivors 101: Do’s and Don’ts
- Supports and Practices that must be in place before contracting/hiring a survivor (i.e. is your organization or agency ready?)
- Agency Readiness Self-Assessment Tool



### **III. PHASE II COST ANALYSIS FOR DESIGNING AND IMPLEMENTING THE TRAININGS AND THE POSSIBILITY OF PROVIDING SOME ON-GOING COACHING, TRAINING, AND TECHNICAL ASSISTANCE SUPPORT FOR SURVIVORS**

While there are many possible ways these trainings could be delivered, for greatest impact, it is recommended that the training include a variety of interactive mediums, as well as an imperative to engage survivors subject matter experts in the design, development of the content, and delivery of the actual trainings. The list and costs below are ideas at this point and will require further discussion and planning.

#### ***Delivery Options:***

- Live webinar tracts for each audience (survivors and agencies) or recorded video presentations and slides with accompanying handouts and access to toolkit resources for survivors and agencies—if live this could include a facilitated and interactive discussion at the end
- Design an online e-learning platform with certificates of completion for each module, along with access to toolkit resources
- Use the above methods, as well as engage survivors in video interviews to discuss the learning objectives and practical application and considerations for each module—this could also include developing discussion/practice guides for each module

#### ***Other Recommendations and Possible Ongoing Support and Technical Assistance for Survivors and Agencies:***

- Ongoing coaching and creation of a “Learning Institute” (or coaching academy) for survivors, providing access to a team of Survivor Leaders and consulting professionals for coaching and mentoring—this could include a monthly call, as well as ongoing technical assistance and one-on-one coaching as requested
- Creation of a Survivor Leader Subject Matter Expert Speaker/Consulting Bureau
- Referrals to Survivor Leaders and Subject Matter Experts for agencies and organizations for consulting contracts

#### ***Estimated Costs:***

It is difficult to estimate projected costs without first knowing the final delivery format and ongoing support options, but the following is an outline of possible expenses. It should be assumed that all contractors involved including the Survivor Leaders and Subject Matter Experts are fairly compensated at a minimum of the federal \$81.25 per hour rate, although the Survivor Leaders engaged in this project expressed collective concern that this rate is the minimum rate that should be considered. A more detailed project budget can be developed once a direction and scope of Phase II is determined.

- Contracted Survivor Leaders and Subject Matter Experts
- Project Manager
- Webinar platform
- E-learning platform
- Storage or place for the training to live
- Structural designer for e-learning platform
- Design and development of toolkit resources and promotional materials
- Other professional contracted partners as needed
- Consultant/SME’s to facilitate ongoing TA and collaboration group for the Learning Institute (name TBD for this group)

# Recommended Next Steps

- Secure funding for the planning, design, and implementation of Phase II.
- Contract with a project manager to facilitate and design the scope of the project, develop a budget, and develop the training content with contracted survivor leaders and subject matter experts.
- Contract with Survivor Leaders and Subject Matter Experts to design and deliver training content.
- Implement planning and design phase.
- Promote and launch trainings and toolkits.
- Analyzing ongoing engagement and training evaluations for reporting and modification.
- Create a “Learning Institute” for ongoing TA and consulting support for survivors.

# TOOLS AND RESOURCES SECTION

Please note, that these tools and resources could and should be further developed if this project is funded. However, there was a desire and request from survivors to develop a few tools and resources that could be utilized immediately, prior to this project moving to Phase II (if funded). The following tips sheets and resources can be used immediately by survivors, agencies, and the Minnesota Human Trafficking Task Force and other professionals.

# Recommendations for Engaging with Survivors as Speakers and Consultants: Guide Sheet for Agencies, Systems, Faith Communities, and other Community Groups/Members

Thank you for your interest in engaging a Survivor Leaders and Subject Matter Expert in your event or upcoming project. This Guide Sheet is designed for agencies, systems, faith communities, and other community groups/members, to help you understand some of the nuances in engaging with survivors to reduce the likelihood of unintentional re-traumatization or re-victimization, as well as to share appropriate communication and compensation practices.

It is also important to note, that survivors are engaged in many areas of professional work beyond “telling their story.” Survivors have led the anti-trafficking movement and are involved in all areas of it including policy and program development, advocacy, training, awareness raising, direct services, systems change, fund development, social enterprises, art, writing and music, and so much more.

For decades, trafficking survivors have been advocating for change in the engagement practices (or lack thereof) of Survivor Leaders and Subject Matter Experts in the anti-trafficking field. While strides have been made to center the voices and leadership of survivors in the work, improvements, education, and the development of best practices are needed to effectively and respectfully engage, employ, contract, and fairly compensate survivors for their invaluable contributions.

As one survivor shared, “There is no amount of money that will compensate for our experiences.” As systems and professionals working with and engaging survivors, there are policies, practices, and trainings that can be put in place, as well as tools and resources that can be developed to support survivors who choose to become involved in anti-trafficking work. These resources can reduce re-exploitation and re-traumatization experienced by survivors and ensure that other professionals engaging with them are properly trained.

This list is based on insight from Survivor Leaders. Survivors are often asked to tell their stories or speak at events, as well as contribute their experience and knowledge to various projects. Survivors are Subject Matter Experts (SMEs) on their experiences and should be treated as the professionals that they are. Here is a guide on how to build a positive and mutually beneficial working relationship with Survivor Leaders and Subject Matter Experts.

- 1. BE CLEAR ON THE “WHY.”** Make sure the purpose, message and expected outcome of the event or meeting is clearly communicated to the SME. Survivors want to know why they are being asked to speak and what you hope the group will gain from hearing them. Since a survivor may be sharing sensitive information in their talk, it’s important for them to know about the setting and audience they will be presenting to. This also applies to consulting requests.
- 2. PREARRANGE PAYMENT.** Survivors deserve to be paid fairly and in line with professional rates for their professional expertise. Booking a survivor for a speaking engagement or consulting project requires an open conversation before the contract is signed, about the details of the event, the expectations, the accommodations and reimbursements, the time and location that their services are needed, who else is involved in the event or project, and the budget and or fees. Being asked to pay upfront and be reimbursed

later can cause financial hardship for many survivors. For instance, asking survivors to prepay for travel or hotel expenses for an event or conference is not possible for many who are rebuilding their life after trauma. Expect to take on these expenses. It should be an expectation that survivors are paid on the day of their event by check and not in other forms of payment. However, some survivors prefer gift cards or cash instead of a check. Please always ask what they prefer. Be open to compensating a Survivor Leader/ Subject Matter Expert on their terms and in line with what they need to keep doing their important work. If there are invoices or processes at your organization that are required for payment, make this known upfront and handle as much of that as you can yourself so there aren't delays. For example, if you know that an invoice must be submitted a specific way, please provide a template. If there is a waiting time or a specific process required for payment, offer to assist in this process. Don't create obstacles, barriers, and hoops for them to jump through to get paid. **Remember: there is no amount of money that will fully compensate for survivors' experiences and expertise.**

- 3. RESPECT THE MESSENGER AND THEIR MESSAGE.** Survivors who are asked to share their stories in unfamiliar settings are subject to re-traumatization or triggers from attendees who act with ignorance or a Savior Complex. As much as possible, make sure your audience is briefed on the survivor's background and area of expertise before the event. Agree beforehand with the Survivor Leader/Subject Matter Expert on whether they are open to Q & A with attendees. Discuss the Survivor's boundaries—what questions are off-limits? Help hold the line for the Survivor's boundaries in sessions or committees. See the examples of inappropriate questions below.
- 4. OFFER THOUGHTFUL ACCOMMODATIONS.** Some Survivors may need childcare for an event or may ask that family members join them for the engagement as a support for dealing with the emotions and anxieties that surround sharing their very personal experiences with complete strangers. Be respectful of the fact that family and loved ones are often there for moral support as Survivors share about their trauma. It is important to offer time and space for a Survivor before and after their participation in an event for mental and emotional recharging. Assign a staff member from your organization to be the go-to host for the Survivor on the day of the meeting or event and make sure they have this person's contact information.

#### **EXAMPLES OF INAPPROPRIATE QUESTIONS: WHAT NOT TO ASK OR SAY TO SURVIVORS—PLEASE BE RESPECTFUL**

- Do not use the term “prostitute” or less-respectful versions of it—survivors have been sexually exploited – this is something that has happened to them—not a title or identity of who they are
- Relationship questions about children and having to co-parent with traffickers
- Questions about transactional interactions—“Have you ever done...?”
- “What are the fetishes that clients have asked you to do/services you provided”
- “Why didn't you leave or do [fill in the blank]?”
- “How many partners did you have in a day?”
- “How did you feel after having sex with that many partners?”
- “How did you survive? How did you get through this?”
- “What about the people who like this work?”
- Questions about sexual orientation of Survivors or clients
- “Why didn't you go to the police?”
- Movie-based questions (Pretty Woman, Trafficked)—these are so far from the truth and always sensationalize the issue
- “What is the difference between a prostitute and a victim?”
- More details about a story that a Survivor has shared. She/He/They has already chosen what details to share.

## UNDERSTAND WHAT YOU ARE REALLY ASKING THEM TO DO

When engaging with a Survivor Leader/Subject Matter Expert, it is not just the time, task, or activity that you are contracting them to perform that will impact them. Common experiences for survivors when presenting or consulting on various projects:

- Can't sleep for days
- Anxiety
- Anger
- Wanting to relapse or escape
- Sadness and pain for days
- Re-experiencing trauma—PTSD episodes
- Feeling like moving backwards or stuck
- Combative and confrontational
- Mad at family (or partners) for the past—resentment
- Feeling loss
- Drained
- Fatigue
- Snappy/irritable
- Depression
- Isolation
- Feeling like no one understands
- Feel like a burden from family and friends
- Escapism and distraction—TV, videos, crime shows, rationalizing
- Difficult to work
- Mental health episodes
- Memories, flash backs, awake terrors, nightmares
- Impacts on family, children, those closest—multitude of ways
- Physical impairment—physical therapy, flare ups, pain, auto-immune
- Dealing with feedback and event surveys—negative or doubtful comments

If you are engaging survivors on any level in your work, it is imperative that you and your colleagues are properly trained and aware of your own policies and practices that should be trauma-informed and prioritize the equitable and thoughtful treatment of survivors as subject matter experts and professionals.

# Public Speaking and Consulting Best Practices Tip Sheet

This Tip Sheet is designed for existing and aspiring Survivor Leaders and Subject Matter Experts as an introduction about working professionally as a consultant or public speaker. This resource includes advice from Survivor Leaders and Subject Matter Experts, as well as a few tools and resources from mainstream public speaking and consulting resources.

## TIPS FOR CONSULTING FROM SURVIVOR LEADERS AND SUBJECT MATTER EXPERTS:

### WHAT IS A SURVIVOR LEADER AND SUBJECT MATTER EXPERT?

- Only you can determine if you're ready to be a leader, share your expertise, or work professionally in the anti-trafficking field as a consultant or public speaker. The term "subject matter expert" refers to someone with lived experience on a specific topic doing professional work. You are the expert of your unique lived experience as a survivor.
- There are many ways that survivors can work professionally in the anti-trafficking field without having to constantly tell your story. Some survivors may be ready to share their stories to raise awareness and help people understand the issue exploitation and trafficking, and some survivors will never want to do this, and that is OK. It is your choice, and you should never feel pressured to do this by anyone including the agency that has helped you or might employ you.
- Survivors have led the anti-trafficking movement and are involved in all areas of it including policy and program development, advocacy, training, awareness raising, direct services, systems change, fund development, social enterprises, art, writing and music, and so much more. You can determine your role and what is best for you – including choosing to take a break or not be involved in this work professionally at all.

### PRACTICE SELF-CARE

If you do decide to work in this field, it is so important to understand that you might be triggered, sometimes often, by the requests made of you, by insensitive or ignorant questions, by burnout because there is so much work to do, or by just a lack of awareness about how non-survivors should appropriately engage with survivors—which can be exhausting to have to continue to teach folks. Because of all of this, it is important that you are aware of your triggers, that you have a plan in place for before/during/after you participate in an event or project in case you are triggered and need to calm down or reset, and that you have a support system of people around you that understand and help you process.

### OTHER HELPFUL TIPS INCLUDE:

- Factor in time for breaks and rest. Take your personal time when needed and put this in your contract. Renegotiate contracts if needed. You come first.
- Be your own advocate. Speak up if you feel you are not being treated well or respected.
- Bring a support person to speaking events if that helps you.
- Ask for childcare help if you need it.
- Realize that you don't have to take Q & A right after you speak. If you need time for yourself, coordinate that with your client. Be honest about what you need.

- Prepare for unexpected triggers. Have a grounding plan for the moment like drinking water, deep breathing, and focusing on a safe person in the audience.
- Have a post-event plan with self-care activities: eating, drinking water, meditating, debriefing with a trusted friend, doing a hobby that brings you joy, seeing safe family members or children, watching something that makes you laugh, taking a nap, exercising, or whatever helps you feel good and safe.

### **A LIST OF INDIVIDUAL ACTIVITIES PROVIDED BY CURRENT SURVIVOR LEADERS:**

- Watch YouTube funny video or other videos to distract yourself
- Process with another person
- Breathing techniques
- Go outside
- Aromatherapy
- Music
- Choosing certain colors
- Meet and process with survivors, de-escalate
- Go to the place early and make a plan for triggers, know the space, the AV, the room, the technology, mentally prepare
- Self-care (nails, meditate, gym, swim, etc.)—work it out right away, don't dwell in it
- Connect with family/kids/grandkids—remind myself of the innocence
- Self-talk—positive self-talk
- Plants, taking care of life
- Journaling
- Window shopping
- Crafts or creative outlet
- Drive
- Pray and/or meditate
- Listen to sermons
- De-escalation practices
- Dressing up/makeup/hair, taking care of yourself
- Baths
- Cry
- Work on projects, business, etc.—positive things to prevent relapse and keep moving forward
- Acknowledging, labeling emotions, mourning, grieving
- Therapy/counseling, regularly
- Organize/cleaning
- Physical therapy
- Workout
- Time with family
- Watching TV, shut brain off
- Process/debrief with colleagues

### **SET BOUNDARIES RIGHT AWAY**

- Clients don't get to hear your personal story unless you agree to share it. Be clear beforehand about what you are there to present on and what is off limits.
- You don't have to answer every question. You can politely decline to answer and move on.
- If there are certain questions you will not answer on a panel, let the facilitator know beforehand.
- Utilize the *Recommendations for Engaging with Survivors as Speakers and Consultants – Guide Sheet for Agencies, Systems, Faith Communities, and other Community Groups/Members* resource that will lay out some of the best practices for professionals and people requesting your services.



## **RATES AND PAYMENT**

- Be upfront and clear on pricing and payment expectations. Be proactive and upfront about contract deliverables. It's OK to negotiate fees and expectations and it's ok to say no.
- See the booking request sample questions and use this to create your own speaking or consulting request form or email that you can use when you get requests. This helps you to have as much information about the request as possible before communicating about your services and fees.
- Use booking contracts. You are usually an independent contractor in these situations which means you can create your own contracts. See the example resource template and customize this for your own expectations. Sometimes the client will have their own contract that they will need you to sign instead, and that is OK, but be sure to read it carefully and understand what you are agreeing to. It is also OK to ask them to make modifications if you are uncomfortable with any of the conditions.
- Create a document (or add this to your website if you have one) that lists your fees (optional) and types of training, speaking, consultation or other services you provide. You can determine your fees, but it is important to know that some clients will have a budget cap or hourly cap that they can pay you based on their funding sources. For example, if you are being contracted to work on an event or project that is funded with a federal grant, there are daily and hourly caps on rates that the client can pay you according to their grant terms. In 2022, these caps are \$81.25 an hour or a maximum of \$650 per day. You can also quote a "Flat Rate" fee by determining how long it takes to do things: travel, planning, reviewing, developing content, printing, paper, taxes etc. and apply a value to that. For example, if someone asks you to travel somewhere for a conference to speak, you can add up all the expenses and quote a flat fee of \$2,000 (this is just an example). This can also be applied to project work if you know it will take a certain number of hours for the prep time, supplies you will need, the actual work, reviewing drafts, and the post-project follow-up work etc.
- Understand what other professionals are charging for the similar services (this is called market research), what the client's budget is, and then set rates at or above the government rate as you think is appropriate.
- It is okay to ask for payment in the form that you prefer. Ask about the payment process—do they need a W9, do they need you to submit an invoice, how long will payment take, are there other options if you prefer not to be paid by check, etc.?
- Be sure to understand that any payment you receive by check (especially if it's over \$600) will be reported to the IRS as income. It is important that you track all of your income that you make as a consultant or speaker/trainer and also record any expenses that you may have—that includes mileage, business expenses like printing, possibly your cell phone, computer or other technology, meals when you are traveling for contracted work, and any other expenses that you have that are related to this income. Please contact an accountant for details. This is just a general summary and is not meant to be tax advice.

## **UNDERSTAND AND COMMUNICATE CLEAR EXPECTATIONS ABOUT YOUR WORK**

- Ask the client about ownership rights or permission for sharing any of your work—does it belong to them after you share it? If so, how will you be compensated for that?
- Understand that some of the work you produce will be considered "work for hire" as a consultant. That means you are paid at the time you create it and then it belongs to the organization who paid

for it. This is common with grant funded projects. Federal and state funded projects automatically own the rights to any works created under the grant. However, you should receive proper credit and acknowledgements.

- If you are creating resources for them, be clear about deliverables and what the fee is for—giving permission for sharing products or video etc.
- Again, it's OK to say 'no' to any requests for your materials.
- Make sure you have a copyright and notice on the materials you use to present with if you created it.

## **APPROPRIATE DRESS**

- Wear business attire to reinforce your professional image as an expert.
- Be aware of the environment you are presenting (for example: a youth rally vs. a luncheon keynote) and dress appropriately
- When in doubt, over dress.
- If you are in a Zoom meeting or virtual setting, also dress professionally and keep your camera on when you are able to.

## **GENERAL TIPS FOR PUBLIC SPEAKING (THESE ARE MAINSTREAM RESOURCES AND NOT RECOMMENDATIONS FROM SURVIVOR LEADERS)**

1. It's natural to be nervous. Preparation is key! Create an outline of what you want to say, in case you lose your train of thought or get off course.
2. Know your audience as much as possible beforehand. Your speech should be catered to what they need to hear.
3. Bring energy and enthusiasm! Especially if you are giving an online presentation. When speaking in person you have your whole body to convey your meaning. If you are presenting virtually, all you have is your face and upper body. If you are presenting over Zoom, you should bring twice as much energy to keep attention.
4. Authenticity matters. Don't be afraid to be vulnerable - audiences respond to this.
5. Your speech should have structure. Don't underestimate the power of a clear beginning, middle and end. Audiences need this structure in order to process what you are communicating.

## **SOURCES:**

### ***The New Rules of Public Speaking - Fortune***

<https://fortune.com/2022/01/18/the-new-best-practices-for-public-speaking-knowledge-charisma-and-authenticity/>

### ***10 Tips for Improving Your Public Speaking Skills - Harvard Professional Development***

<https://professional.dce.harvard.edu/blog/10-tips-for-improving-your-public-speaking-skills/>

## HOW TO BE A PROFESSIONAL CONSULTANT

1. **GATHER FEEDBACK.** Ask your point of contact for feedback on your consulting services. What worked? What didn't? This will help you improve and it shows your client that you care about the results of your services - making them more likely to rehire you.
2. **PERFECT YOUR PRESENTATION.** The structure of your presentation matters. Make sure you have a compelling intro and visuals that support the story you're telling. Use graphics and charts from trusted sources to help your audience understand your content on different levels. Using video can also be powerful - just make sure it comes from a reputable source.
3. **MIND THE DETAILS.** Your relationship with clients includes how you handle the everyday details of the service you offer. It's not just about what you present, it's about how you conduct yourself with your client before, during and after the services are delivered. Answer emails on time, be on time to in-person and virtual meetings (keep your camera on if you can), and try to understand the complexities of the client you are serving. Your attention to detail will go a long way in your client relationships.
4. **CHOOSE YOUR CLIENTS CAREFULLY.** Sometimes, certain clients will not be the best fit for what you offer. Make sure to have an initial conversation with a potential client to understand what they are looking for, who their audience is, and what their expectations are for you. Take the time to gauge the client during your initial meeting to see if it will be a good fit for you.
5. **MARKET YOURSELF.** You are your best marketer of the services you offer. It's important to include your name and contact info on any materials you hand out to an audience—these are all potential new clients. There are many free business card designers online. Create simple, clean-looking, professional cards and make sure you have them ready to hand out at any presentation or meeting. Also make sure that your online presence is consistent and professional. Create a LinkedIn account, and make sure that your social media accounts do not have personal information shared publicly, and that all your account profiles are professional. Create a website or other online presence that is easy to find that you can share with potential clients and colleagues. Remember that you are your best salesperson because you know the full value of what you bring to the table. Don't be afraid to self-promote!

## SOURCES:

### ***7 Consulting Presentation Tips to Land and Satisfy Clients***

<https://www.constantcontact.com/blog/7-consulting-presentation-tips-to-land-and-satisfy-clients/>

### ***How to be a Better Consultant: 8 Tips and Strategies***

<https://www.constantcontact.com/blog/how-to-be-a-better-consultant/>

## HELPFUL VIDEOS

*How to Become Full-time Paid Public Speaker:* <https://www.youtube.com/watch?v=oxJWQtLTTVc>

*Top Tips for Becoming a Powerful Speaker:* <https://www.youtube.com/watch?v=O9NjYbtFjKY>

*Responsibilities of a Speaker:* <https://www.youtube.com/watch?v=rXp7W-9yOLI>

## **OTHER TOOLS AND RESOURCES FOR SURVIVORS**

These have not been vetted but were shared by the Survivor Leaders. These are resources, trainings, tools, and networks to help survivors develop their own consulting or public speaking business.

- SHYNE – assists survivors in setting up businesses free
- Rebecca Bender – (some resources are free, check her website)
- GEMS – becoming a survivor leader conferences and events and groups
- Project 360 Degrees
- Sun Gate Foundation
- HEAL Trafficking– (check research)
- Survivors Network
- Survivors Alliance – tools, events, resources
- REP Career Trainings – community response training (not trafficking related)
- JUST Conference – Shared Hope (need funds for fees, travel, lodging, etc.)
- Shared Hope Survivor Group

## **TECH TIPS**

Canva - Free graphic design platform with templates for creating social media graphics, presentations, posters, documents and other visual content

Create a free blog or website with Wordpress, Blogger or Wix

VistaPrint offers 100 custom business cards for \$15

Google has free tools and templates for surveys, spreadsheets, calendar, forms, and more

# E-mail Communication Tools and Templates for Survivors

The following are email response templates for communicating with people contacting you for potential consulting and presentation opportunities. Survivors share that it can be difficult to have to think up responses for common questions and requests all the time. Here is some starter language for common questions and requests that you can copy and paste or customize to make it a more personal response from you. The information in the brackets *[example]* are notes and options for you. You would remove these before sending.

## **EMAIL RESPONSE TEMPLATE #1 : FOR GENERAL INQUIRES AND REQUESTS**

Thank you for your email and interest in my professional consulting/training services as a Survivor Leader and Subject Matter Expert *[add your own title here that you feel comfortable with or edit as you want]*

I am interested in learning more about this opportunity. To better help me respond to your request and provide an accurate estimate for my fees, will you please take a moment to fill out this booking request form? *[add survey link to form or you could also include these questions in a Word document or the body of the email]*

Once I get your responses I will be in touch with more information.

Thank you and I look forward to hearing from you.

**ADD YOUR SIGNATURE**

## **EMAIL RESPONSE TEMPLATE #2: NEXT STEPS AFTER SOMEONE FILLS OUT YOUR BOOKING REQUEST SURVEY**

### ***[option 1 response if you want to do the job]***

Thank you for completing my booking request survey. I appreciate the extra information and details. I am interested in participating in this *[event or project]* and I'd like to learn more about the next steps. Would you like to set up a call to discuss your budget, my fees, and the contracting process? Or do you prefer to do this by email? If you prefer a call or Zoom call, I have the following times available *[add 3 options with dates and times]*. Please let me know what works best for you. I look forward to your response.

**ADD SIGNATURE**

### ***[option 2 response if you do not want to do the job]***

Thank you for completing my booking request survey. I appreciate the extra information and details. I appreciate the invitation and opportunity, but after reviewing the *[event or project]* details, I am going to respectfully decline. *[You can add a reason if you want to, but you don't have to—you can just say no thank you without an explanation if you don't feel like it is a good fit or something that you want to be part of].*

Thank you again for reaching out and best of luck with your plans.

**ADD SIGNATURE**

**EMAIL RESPONSE TEMPLATE #3 : FOR SURVEY OR COMMITTEE REQUEST THAT ARE UNPAID OR OFFERING GIFT CARDS IF YOU THINK IT IS AN INAPPROPRIATE REQUEST.**

Thank you for your email and interest in my professional consulting/training services as a Survivor Leader and Subject Matter Expert *[add your own title here that you feel comfortable with or edit as you want]*. While your *[event, research project etc.]*, seems important, I'm afraid the compensation being offered for my time and expertise is an inappropriate request.

Please understand that it is not just my time to complete the task that you are requesting, but years of experience and expertise. In addition, there are triggering effects of the questions and experiences that you are asking about that impact survivors who participate in these projects for hours, days, and sometimes longer, after having to think about and re-live the traumatic experiences you are researching.

Please also note that when you make these requests without that context or the understanding of how it feels to be devalued by offering a small gift card, it also triggers feelings of shame, anger, and humiliation due to the relationship with money that many survivors have due to our exploitation.

Being aware of all these factors is being trauma-informed and is a best practice for engaging with survivors on any level.

I do appreciate the work that you are doing and the opportunity to participate. If you have an appropriate request in the future, please keep me in mind.

Respectfully,

ADD SIGNATURE

# Booking/Request for Services Form Template

This survey form is designed to use with people who are requesting your professional services. It can be added to a website or sent in an email using an online form. Google forms or Jotform are free and easy to use. There are also many other free forms you could use. If you don't want to use an online form, you could also include these questions in a Word document that you send and ask them to fill out, or the body of the email, but it is best to send them to an online form if you can, so you can keep all your booking requests in one location. The following questions have been adapted in part from The Enitan Story. Thank you, Oriola Bukola!

Thank you for your email and interest in my professional consulting/training services as a Survivor Leader and Subject Matter Expert *[add your own title here that you feel comfortable with or edit as you want]*

To better help me respond to your request and provide an accurate estimate for my fees, please take a moment to complete this booking request form.

**Requester Name:**

---

**Requester Email:**

---

**Requester Phone:**

---

**Requester Address:**

---

**Type of Event (check all that apply):**

- Training
- Conference Keynote
- Presentation/Workshop
- Fundraiser
- Consulting Project
- Other:

---



**Location of the request (in-person location or virtual platform used):**

---

**Event/Project Date:**

---

**Event/Project Start and End Time:**

---

**Duration you need speaker/trainer/consultant:**

---

**Who is the target audience (or who will be in attendance) and how many people do you expect?**

---

**Are there other presenters/consultants involved? If so, who?**

---

**Who will be funding this request and what is your payment and invoicing process? Please note that fees for services are due the day of or before the event.**

---

**What is your budget for this request?**

---

**If it requires travel, please also note the availability of airfare, mileage/ground travel, hotel, and meals.**

---

**If this request is for a conference or speaking event, will you make accommodations for survivors to bring a support person?**

---

**Do you have any audio-visual capabilities? What will you be able to provide? (Check all that apply):**

- Microphone
- Computer
- Screen/projector
- DVD capabilities
- PowerPoint capabilities
- Virtual platform (please be specific about which one above)
- Someone on site/or virtual to help with tech set-up

Were you referred to me or how did you learn about my consulting/training services?

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Do you have any other comments or special requests?

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*Note: Completing this form is not an automatic guarantee that I will be able to accommodate this request. Once I receive your information, I will follow-up about next steps. Thank you!*

*Should any question arise from the information you have provided in this form, please, respond within 24 hours. Thank you for your understanding and cooperation. Kindly click "YES" below to acknowledge that you have read and understood this disclaimer. Thank you for your cooperation.*

YES

# Initial Proposal & Contract Templates

Having a professional contract for your services is important to ensure that you have an understanding between you and your client about your fees and payment terms, your project deliverables, cancellation clauses, and any other expectations or conditions you want to communicate. Having clear communication up front about ownership of the work you are producing, the training or presentation you are agreeing to, or consulting services you are providing helps to avoid misunderstandings and confusion.

The following is a very basic outline of a sample contract. However, you should have an attorney review your contracts if you need legal advice. This is just meant to be a guide and you can customize it any way that you need to. \*Note – it is common to provide a proposal that lays out what you are agreeing to do along with your pricing structure or options prior to sending a contract for signature. Please see the example below and adapt to your situation.

You can create an easy professional letterhead in Canva or Word for your proposals and contracts.

## PROPOSAL TEMPLATE

**Prepared For:** *[add client name]*

**Date Prepared:**

**By:** *[add your name]*

**Goal:** *[add 1-2 sentences about the overall project or your proposed services. Example: To provide consulting services for XYZ project to increase training and trauma-informed practices for staff in a housing program.]*

**Proposed Scope of Work:** *[add bulleted details about what you are agreeing to do]*

*Example:*

- *Participate in a Zoom planning meeting/call to address questions and create a training outline based on client's needs.*
- *Review of relevant existing program policies and procedures and manuals.*
- *Draft custom training plan for staff based on unique needs.*
- *Deliver trainings [add dates, times, etc.]*

**Fee Options and Payment Details:**

**Hourly Consulting Rate and Proposed Number of Hours:** *[add if you are planning to do this on an hourly rate]*

**Flat Rate Cost:** \$ \_\_\_\_\_ *[add this if you prefer to do a flat for the entire project. Sometimes this can be more profitable if you know about how long it will take you to complete the deliverables]*

**Additional hours available at your request at a rate of:** \$ \_\_\_\_\_

**Timeline:** Flexible to fit your desired timeframe but I would be available to begin \_\_\_\_\_ [add when] and anticipate \_\_\_\_\_ [add how long] to complete the project (depending on your availability).

**Payment Terms:** [you can determine what you want as a deposit for your services—this is just an example]

*Example: Signed contract and 50% deposit to begin and remaining balance due within 7 days of project completion. Check payment is preferred, and invoices will be submitted for payment.*

**Next Steps:** [you can edit this as you want to but this is a starting point]

*Example: Please note that this proposal was drafted based on our previous conversation but can be modified to fit your unique needs and budget. Feel free to contact me with any questions or edit suggestions. If you would like to proceed with securing my services, I will draw up a contract for your review as a next step.*

**This pricing estimate is guaranteed for 30 days. Thank you so much for your consideration!**

# Consulting Contract Template

Independent Contractor Agreement between [add client name] and Consultant, [add your name].

This Independent Contractor Agreement (this “Agreement”) is made as of \_\_\_\_\_, (date) by and between [add client name and address] with offices located \_\_\_\_\_ and [add your name and mailing address] (“Contractor”), with offices \_\_\_\_\_.

## SCOPE OF PROJECT

[this should match the proposal terms if you did that step in the booking process]

## GOAL

[add 1-2 sentences about the overall project or your proposed services.]

Example: To provide consulting services for XYZ project to increase training and trauma-informed practices for staff in a housing program.

## PROPOSED SCOPE OF WORK

[add bulleted details about what you are agreeing to do]

Example:

- Participate in a Zoom planning meeting/call to address questions and create a training outline based on client’s needs.
- Review of relevant existing program policies and procedures and manuals.
- Draft custom training plan for staff based on unique needs.
- Deliver trainings [add dates, times, etc.]

Timeline to be completed by \_\_\_\_\_ [add date].

## REPORTING RELATIONSHIP

Contractor will report directly to \_\_\_\_\_ [add who your contact is].

## RELATIONSHIP OF PARTIES

\_\_\_\_\_ [client name] and \_\_\_\_\_ [your name] intend that the signing of this agreement will create an independent contractor relationship between the parties. \_\_\_\_\_ [your name] is not considered an agent or employee of \_\_\_\_\_ [client name] for any purpose. As an independent contractor, \_\_\_\_\_ [name] shall not be eligible for unemployment benefits or worker’s compensation insurance and shall not participate in any benefit program such as health insurance, life insurance, pension, profit sharing plans, paid vacation or paid sick leave. \_\_\_\_\_ [your name] also reserves the right to provide services for other non-profits and agencies at her own discretion.

## COMPENSATION AND CONTRACT DURATION

\_\_\_\_\_ [client name] shall pay to Contractor a fee of \$\_\_\_\_\_ [add amount you agreed to] for the services described in this contract. Hours and services requested above and beyond the scope of this project may be requested for an additional fee (approved in advance by client).

## PAYMENT TERMS & CONTRACT DURATION

[this is an example only and you can decide what your terms are]

\_\_\_\_\_ [your name] requests a down payment of \_\_\_\_\_% of the total flat fee with a signed contract to begin services. An agreed upon workplan will be developed upon receipt of deposit and signed contract. The remaining balance is due within 7 days after project completion.

## PAYMENT PROCESS

Invoices are provided at the start and end of the project and due within 7 days of billing date.

## EXPENSES

Any additional expenses will be pre-approved by client and contractor in the case of additional items requested that are not covered in this proposal.

## INDEMNIFICATION

Both parties agree to indemnify and hold harmless the other from all claims, losses, expenses, fees including attorney fees, costs, and judgments that may be asserted against the other that result from the grossly negligent acts or omissions of the party, its employees, and agents.

## TERMINATION

If either party is not satisfied with the above agreement or services provided, the contractual agreement can be terminated at any time with written notice by either party. Either party also has the right to request a renegotiation of this relationship. Any changes to this agreement shall be in writing and signed by both parties.

Client name and signature:

\_\_\_\_\_

Date:

\_\_\_\_\_

Contractor name and signature:

\_\_\_\_\_

Date:

\_\_\_\_\_