

# Annual Review Checklist

*The following checklist outlines information to consider in monitoring the effectiveness of strategic workplace responses to domestic violence, sexual violence, and stalking. From this resource, you will be better able to:*

- *Compare activities, trainings, and staff engagement from previous years to the current year;*
- *Identify staff awareness of responses to domestic violence, sexual violence, and stalking; and*
- *Develop necessary changes to trainings and reporting mechanisms to better serve workers who experience or use violence.*

## I. Annual Reporting System

Set up a system for reporting the following and review these reports at least annually. This system can be as simple as a spreadsheet through Microsoft or Google; or as complex as an online management system. Be sure to follow internal policies around data privacy and confidentiality when designating access to this data. Data and numbers to capture include:

- Number of workers and managers receiving training or educational information on domestic and sexual violence (including sexual harassment) and stalking.
- Number of workers requesting information or referrals to local, state or national service providers.
- Number of workers requesting workplace assistance or accommodation, and the types of accommodation requested, such as time off for needs related to domestic or sexual violence or stalking, an altered schedule or shift, a different work location, or new contact information
- Number of orders of protection or restraining orders given to management by workers or taken out by the employer in consultation with workers (see the [Protection Order Guide](#) for details).

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- ❑ Number of sexual harassment complaints and investigations, and information about outcomes (i.e., whether the complaint was resolved and how).
- ❑ Number of domestic violence, sexual violence, and stalking resources available to workers – e.g., posters, signs, pamphlets, web tools.
- ❑ Workplace safety plans made in response to domestic violence or stalking threats.
- ❑ Measures aimed to prevent incidents of sexual harassment and violence (see the [Why is this a Workplace Issue?](#) for details).
- ❑ Incident reports of any violent events that involved workers or others at work.
- ❑ Changes to policies or procedures that were implemented during the last year.
- ❑ Disciplinary actions and referrals for workers who committed acts of violence or harassment.
- ❑ Number of lawsuits and formal complaints that were filed for sexual harassment and violence.

## II. Needs Assessment

A needs assessment is an opportunity to identify staff needs to inform yearly training opportunities, areas where more support is needed, and strengths as well as areas of improvement for organizations to respond to domestic violence, sexual violence and harassment, and stalking in the workplace. An effective needs assessment has the following components:

- ❑ Skilled facilitators who can conduct 1-2 hour listening sessions to understand the needs, desires, strengths, and skills of the staff to inform future work.
  - External facilitators are preferred that can remain unbiased while listening to worker needs.
  - Provide an anonymous option through a survey or other element for staff safety and confidentiality.
- ❑ A representative sample of the workplace, engaging everyone from entry-level or temporary personnel through senior leadership, with confidentiality agreements in place.

- A note taker who can capture the items to present at future action planning meetings

### **III. Action Planning**

After reviewing the annual report and notes from the needs assessment(s), identify what the organization is doing well as well as areas to improve by setting aside a half or whole day action planning session. Consider these questions in the session:

- What do we want to achieve this year to improve safety and equity in the workplace?
- How are we going to achieve these goals?
- Who should be involved in this process?
- What is our time frame to achieve these goals? Are they realistic?
- What are our smaller action-items on a monthly or quarterly basis to get to the goal, and who is responsible for completing each action item?