

TOOLKIT

# Creating a Trauma-Informed Workplace:

## A Toolkit to Support Planning and Implementation

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Based on the “Creating a Trauma-Informed Workplace” series conducted by Origins Training & Consulting

## OVERVIEW

So, you've heard about ACEs and toxic stress, and you're ready to put the concepts into action? Use this toolkit as a resource.



Trauma-informed care (TIC) offers a way for organizations to understand the impact of toxic stress and building resilience on both patients and staff, then leverage that understanding to improve organizational culture and practices. Within community health, TIC provides a critical foundation for integrating screening for Adverse Childhood Experiences (ACEs).

**Operationalizing the science of resilience is a process and builds off the following principles of trauma-informed care:**

1.	<b>Establish</b> the physical and emotional safety of patients and staff
2.	<b>Build</b> trust between providers and patients
3.	<b>Recognize</b> the signs and symptoms of trauma exposure on physical and mental health
4.	<b>Promote</b> patient-centered, evidence-based care
5.	<b>Ensure</b> provider and patient collaboration by bringing patients into the treatment process and discussing mutually agreed upon goals for treatment
6.	<b>Provide</b> care that is sensitive to the patient's racial, ethnic, and cultural background, and gender identity

### A trauma-informed approach in action

This toolkit offers a structure to support you and your team as you build a trauma-informed and resilience-building culture within your organization. It introduces each topic, then shares activities and discussion prompts to help you and your team explore, integrate, and apply this approach.

**Remember:** Integrating a trauma-informed approach is not a checklist. It's an ongoing process of culture change that can be messy, non-linear, and lengthy. Each step in this toolkit represents one part of the process that will require time and patience, and may even need to be revisited in the future. Focus on the journey, not the destination.

**For more information and guidance on trauma-informed care, visit [originstraining.org](https://originstraining.org).**

## STEP 1

# BUILD AN ACTION TEAM





The first step is to identify your action team, which will lead the resilience-building work within your organization. Teamwork is critical for integrating this approach. Developing a team whose culture models the principles of a trauma-informed approach will support its integration within the clinic. **You cannot do this alone.**

As you gather your team, consider structural inequities and power dynamics that may influence the makeup of who has a seat at the table, whose table it is, and who is setting the agenda.

Include people from as many clinical and non-clinical roles as possible. Examples include medical assistants (from the front and back of the clinic), providers, case managers and/or behavioral health staff, senior leadership, facilities managers, and patients. It may also be appropriate to consider the role of community partners.

### ACTIVITIES AND QUESTIONS TO DISCUSS

	<b>Inclusivity</b>		<b>Creating safety</b>
	<p>Who's on your team?</p> <hr/> <hr/> <hr/> <p>Who may be missing?</p> <hr/> <hr/> <hr/> <p>How will you ensure the voice of patients and all staff are heard?</p> <hr/> <hr/> <hr/>		<ul style="list-style-type: none"><li>▪ <b>Develop agreements</b> (not rules) that will help guide the culture of the group.</li><li>▪ <b>Reference the principles</b> of a trauma-informed approach, and ask each other, "How will we create a culture of physical and emotional safety?"</li><li>▪ <b>Identify any barriers</b> that might get in the way of living the agreements.</li><li>▪ You and your team may also want to <b>revisit these agreements</b> over time.</li></ul>





## Developing your vision

### Creating a trauma-informed culture is a team effort!

After each person shares what inspires them in their work, your team will explore your vision for what trauma-informed care looks like in your clinic, whether it's with patients, staff, or both.

Be as clear as possible about what you want to achieve so you can communicate your vision to key stakeholders.

**Remember: think big!**

### Examples of a vision for trauma-informed care

- 1.** **Create a community** where all members, regardless of income, have access to services that improve wellness and address root causes of health issues.
- 2.** **Create a workplace** where staff members are healthy, engaged, and feel supported by the organization.
- 3.** **Create a clinic** where we acknowledge, address, and overcome racial health disparities and other social determinants of health.



## Communicate your vision and get buy-in

### TIC is most effective when it's implemented and supported by an engaged team.

Consider the needs of various key stakeholders as you develop and target your message to them. You may find it helpful to first identify roles (e.g., CMO, board members, MAs) and discuss their specific needs. Then, explore how a trauma-informed approach will offer them solutions.

Identify the role of the person you are addressing: \_\_\_\_\_

#### NEED

What is the specific issue that this person/role is struggling with?

#### SOLUTION

How can a trauma-informed approach help resolve or improve the issue?

#### ENGAGE

Ask role to participate in the solution to the issue.

## STEP 3



# DEVELOP YOUR CULTURE

Organizational culture develops over time. All organizations, communities, and families have a culture, whether it has been created intentionally or not. Changes in staffing, agency size, or restructuring are a few factors that can impact culture.

Part of being intentional is articulating a set of shared values, which will help guide your implementation. The culture you nurture is going to help sustain your resilience-building efforts. **Remember this saying: “The values we define affect the solutions we design.”**

## ACTIVITIES AND QUESTIONS TO DISCUSS



### Define your values

#### Identify your organization’s core values with your team.

As Brene Brown says, “A value is a way of being or believing that we hold as important... As leaders, we need to be clear about what we believe and hold important, and we need to ensure that our intentions, words, thoughts, and behaviors align with our values.”

**Use the list** (or a different list of your choice) to identify core values that are important to your team and that support your vision.

Abundance	Fairness	Order
Acceptance	Faith	Passion
Achievement	Family	Peace
Authenticity	Fitness	Perseverance
Balance	Freedom	Quality
Bravery	Friendship	Respect for others
Care for others	Fun	Responsibility
Commitment	Generosity	Security
Competence	Gratitude	Self Respect
Contention	Harmony	Self-Control
Cooperation	Honesty	Serenity
Courage	Humor	Service to others
Creativity	Independence	Simplicity
Dependability	Innovation	Spirituality
Discipline	Joy	Stability
Diversity	Kindness	Success
Effectiveness	Knowledge	Teamwork
Empathy	Love	Well-being
Equality	Loyalty	Winning
Excellence	Openness	Wisdom



## Discuss how you live these values

Once you and your team have identified your values, explore how those values show up (or don't show up) in your setting.

**Remember: The creation of a safe environment is critical to these tough discussions.**

Encourage a variety of team members to share experiences and perspectives. Inquire about how the solutions your organization has found reveal your values.

### Discuss:

How do our recruitment and hiring processes support (or not support) each value?

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What policies support (or don't support) each value?

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What experiences have you had that do (or don't) support each value?

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## Continue to practice communicating your vision

Practice leads to progress. Use the chart to consider the needs of various key stakeholders and tailor your message to them.

Identify the role of the person you are addressing: **Operations Manager**

### NEED

We all know that our organization has been struggling with high turnover in staff.

### SOLUTION

Staff are leaving because of compassion fatigue and burnout. A trauma-informed approach can help employees build skills to reduce compassion fatigue and burnout.

### ENGAGE

As an operations manager, you can help reduce turnover by carving out time for staff training on practical resilience-building skills (as part of trauma informed care).

## STEP 4

# ASSESS YOUR SETTING



Each organization has a different starting point. You and your team will define a systematic approach to gather information about strengths, assets, what’s working well, and what could be done differently to best support staff and serve patients.

The information you gather in the assessment will examine the different domains of your setting, such as leadership capacity, services, clients, policies and procedures, and physical environment. Once identified, the results will help guide the development of specific goals and activities.

### Five domains that are common across these tools:

1. Supporting staff development
2. Creating a safe supportive environment
3. Assessing and planning services
4. Involving consumers
5. Adapting policies

### Assessment tool resources

Harris, M. and Fallot, R. (Eds.) (2001). *Using Trauma Theory to Design Service Systems*. New Directions for Mental Health Services. San Francisco: Jossey-Bass- Creating Cultures of Trauma-Informed Care (CCTIC): A Self-Assessment and Planning Protocol. <https://traumainformedoregon.org/wp-content/uploads/2014/10/CCTIC-A-Self-Assessment-and-Planning-Protocol.pdf>

**The Agency Self-Assessment for Trauma-Informed Care.**  
[http://www.traumainformedcareproject.org/resources/Traum%20Informed%20Organizational%20Survey\\_9\\_13.pdf](http://www.traumainformedcareproject.org/resources/Traum%20Informed%20Organizational%20Survey_9_13.pdf)

**ARTIC. Attitudes Related to Trauma-Informed Care Scale.**  
<https://traumaticstressinstitute.org/the-artic-scale>

**Professional Quality of Life Scale.** <https://proqol.org>

**Trauma Informed System Change Instrument.**  
<https://traumainformedoregon.org/wp-content/uploads/2014/10/Trauma-Informed-System-Change-Instrument-Organizational-Change-Self-Evaluation.pdf>

**National Child Traumatic StressNetwork (NCTSN). Trauma Informed Organizational Assessment Information Packet.**  
<https://www.nctsn.org/resources/trauma-informed-organizational-assessment-information-packet>

**Becoming Trauma-Informed and Screening for ACEs - Montefiore.**  
<https://www.careinnovations.org/resources/webinar-becoming-trauma-informed-screening-aces-montefiore/>



## STEP 4 | ASSESS YOUR SETTING

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### ACTIVITIES AND QUESTIONS TO DISCUSS



## Administering tools

What tool will we choose, an existing one or one that's created by our team?

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How will we administer a tool: electronically, on paper, or in person?

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When will we administer a tool: during team meetings, on our own time, or during one-on-one conversations with other stakeholders?

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How will we analyze the information collected?

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### Tips to keep in mind

- Redesigning systems and structures will require you to consider the values of diversity, equity, and inclusion in ALL of these domains.
- The assessment process is as important as the results. Taking a trauma-informed approach means considering how you will integrate your values, and potentially the principles of this work, into your process.
- Consider initiatives that your clinic may already have in place through Quality Improvement, Human Resources, or others. Utilizing systems that already exist helps integrate this approach so it doesn't feel like one more thing to track.

## STEP 5

# CREATE AN ACTION PLAN



Use the findings from the assessment completed in Step 4 to define concrete goals for integrating a trauma-informed approach into your setting. Using tools rooted in strategic planning, your team will then translate those goals into a concrete action plan by brainstorming and prioritizing potential solutions.

### ACTIVITIES AND QUESTIONS TO DISCUSS

Work through the following questions either individually or as part of your Resilience Champion team. Use the worksheets provided as a tool to support the activity.



### Define goals

**Your goals describe specific objectives that you would like to accomplish.**

They translate your overall vision into concrete next steps that will help achieve that vision. Some of the goals will be short term, and some will require more time to execute.

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### Brainstorm activities

**Taking steps to meet your goals will include activities.**

These smaller tasks will result from a larger brainstorming list. (Keep that longer list handy. You may want to come back to those ideas in the future!)

For each goal, brainstorm potential activities that could help achieve the goal.

In addition to thinking about activities you may want to **START**, consider activities you want to **CONTINUE** or **STOP**.

For those activities you want to **CONTINUE**, are there any changes you need to make?

## STEP 5 | CREATE AN ACTION PLAN



### Refine your list

From your initial brainstorming list, choose 1-3 specific activities that you would like to focus on for now.

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Remember: These could be new activities you would like to START, existing efforts that you would like to CONTINUE, or activities you would like to STOP.



### Organize your action team

How will your team work together to implement these activities?

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For each goal, what are the 1-3 activities you will focus on to help you achieve it? Are any of these activities things you are already doing (or things you plan to stop?)

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How will your action team help you implement these activities?

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### Tips to keep in mind

- **Be specific.** Think about the findings from your assessment. What is the specific area you would like to improve?
- **Measure success.** Measurement can be tricky when integrating a resilience-building approach. How will you know if you're making progress toward your goals? What will success look like?
- **Remember this is a team approach.** Think about your allies for this work: people both within and outside of your setting who can help. You cannot do this alone. A strong team is essential to prioritize and problem-solve.
- **Make sure your goals are realistic and timely.** Think about your setting and your sphere of influence within that setting, and create goals that are achievable. Early success with smaller goals will more likely lead to buy-in from others than grand plans that sound great but don't go anywhere.
- **Remember the mantra:** Keep it simple!



## Your guides on the journey to resilience

We hope the coaching you received, along with this toolkit, offer a framework for addressing the challenges your organization is experiencing and guide you on your journey toward building resilience, achieving higher quality outcomes, and breaking the cycle of intergenerational trauma.

For additional support as you implement a trauma-informed approach, reach out to Origins Training & Consulting.

 [originstraining.org](https://originstraining.org)

 [info@originstraining.org](mailto:info@originstraining.org)



### About Origins Training & Consulting

Andi Fetzner, PsyD, and Lori Chelius, MBA/MPH, founded Origins Training & Consulting to create communities where root causes are the starting point for understanding health and behavior. Together, they help educators, health care professionals, social service workers, and other leaders integrate a trauma-informed approach into their work so they can become more resilient individuals, organizations, and communities.