

How to Lead an Effective Advisory Meeting

1

Set Clear Objectives

- Define meeting goals in advance.
- Share the agenda early so everyone feels prepared.
- Help everyone understand the outcomes to celebrate progress.

2

Invite the Right People

- Include voices with different experiences.
- Invite just the people needed to keep things on track.
- Make sure everyone is ready and informed.

3

Create a Safe Space to Talk

- Encourage everyone to share and join in.
- Ask questions that help us learn and take-action.
- Allow time for feedback and all voices to be heard.

How to Lead an Effective Advisory Meeting cont.

4

Keep Meetings Organized & on Time

- Begin & finish the meeting as scheduled.
- Share the agenda and leave time for open dialogue.
- Have a leader keep the discussion focused.

5

Focus on Decisions & Next Steps

- Summarize key points and action items.
- Assign tasks and deadlines.
- Share meeting notes with everyone

6

Encourage Improvement

- Ask for feedback to improve meetings.
- Adapt format to the group's needs.
- Check often if meetings are work well.

Important Ways to Keep People Engaged and Involved

Belonging is more important than just taking part.

Retention is about feeling valued, not just showing up.

Encourage a culture of caring for each other, not just getting work done.

Show the impact and ask for feedback.

Celebrate the role they played in making things better.

Important Ways to Keep People Engaged and Involved cont.

Keep people updated by showing: “You said it, and we did it.”.

Provide members with opportunities to learn, lead, and take charge.

Help build transferable skills or create pathways to other roles.

Regular check-ins, time to connect with peers, help everyone feel safe and hopeful.

Support the *whole person*, not just their advisory role.

What is Co-Design?



Co-design means working *with* people and communities to create something, instead of doing it *for* them. It makes sure the people most affected by a problem have a strong voice in every part of the process—from the idea to the final plan.

It values lived experience as a form of knowledge.

It builds trust by being open and honest.

It shares power and includes everyone in making decisions.

It lets people who know the problem best help lead the way to solutions.



Co-design means working together with people who have lived experience through every part of a project. This includes choosing the topic, planning, taking action, and reviewing how it went.

It's a partnership where everyone gets a fair chance to share their ideas, help make decisions and take part in the work.

Co-design is more than just being included—it means the voices of people with lived experience help guide the project from beginning to end.

Lived Experience Co-Design Guide

Set Intentions & Build Relationships.

**Define the purpose
with, not *for*, LEx.**

**Invest in trust-building
and relational
groundwork.**

**Ensure accessibility
and cultural safety
from the start.**

**Recruit
Collaboratively &
Inclusively.**

**Co-create recruitment
criteria with
community input.**

**Ensure meaningful
diversity of LEx is
represented.**

**Be clear about roles,
time, and pay.**

**Explore Needs &
Priorities Together.**

**Engage inclusively and
with trauma awareness**

**Let LEx guide what
matters—*don't
assume the problem.***

**Create space for
storytelling and
different ways of
knowing.**

Lived Experience Co-Design Guide cont.

Use creative tools
(storyboarding,
mapping, etc.).

Ensure equal influence
in decisions.

Implement
Collaboratively.

Involved in executing
initiatives not just
designing them.

Create feedback loops
for real-time
adjustments.

Evaluate & Reflect
Together.

Co-develop evaluation
tools and indicators.

Include LEx in
analyzing results and
insights.


Reflect on the process:
*Was it truly
collaborative?*


Recognize and
celebrate
contributions.


Create pathways for
continued involvement
or leadership.


Shift structures, not
just programs, based
on outcomes.


Lived Experience (LEx) Readiness Checklist

 Is steady funding available to pay people with lived experience for their time and knowledge?

 Does the organization or team clearly communicate compensation and other benefits to people with lived experience?

 In addition to financial compensation, are there other forms of compensation like professional development available?

 Does the group allow people with LEx to lead and guide the work, even when their ideas are different from the group's?

 Does the agency build and keep good, lasting relationships with people with lived experience beyond one project or program?

 Is there a buddy or mentor program in place to support new members?

Asking Others to Share

When you ask someone to share their life story, show respect and care by:

Clearly explaining **Why**, you want to hear their story and how it can help.

Valuing their true story, letting them share it in their own way.

Encouraging them to be honest without changing their story to please others.

Being open about how their story will be used and who might hear it, so they feel safe and confident.

What's In It For Me? (WIIFM)

Exercise Time: 20-30 minutes, depending on the number of people participating.

Goal: Have participants reflect on and discuss their expectations.

Instructions: Have each Board member introduce themselves and share:

What are the benefits to you of being on the Board?

How do these benefits align with the Board's Mission and Vision?

What can you contribute to the Board?

How can you stay actively involved with the Board?

Team Building Reflection Tool

- This self-assessment encourages you to reflect on your abilities to reflect, connect, collaborate, and lead.
- The first column presents questions focused on how family-facing professionals engage in reflection, connection, collaboration, and leadership.
- The second column asks you to evaluate your proficiency in these areas by rating your practice on a scale from 1 to 5, where 1 means "I do not do this at all" and 5 means "I do this all the time."
- The third column invites you to consider how you could improve in each area.

Reflect

1. How do I demonstrate respect when working others?
2. How is respect a reciprocal process?

Proficiency (1-5)

○ ○ ○ ○ ○

Ways to Improve

Connection

1. How well do I build trusting reciprocal relationships with others?
2. In what ways do I cultivate mutual trust with others?

Proficiency (1-5)

○ ○ ○ ○ ○

Ways to Improve

Collaborate

1. How well do I co-construct learning opportunities with others?
2. How do I participant as a team player when working with others?

Proficiency (1-5)

○ ○ ○ ○ ○

Ways to Improve

Lead

1. How well do you advocate for system change?
2. How do I work to ensure my voice is heard?

Proficiency (1-5)

○ ○ ○ ○ ○

Ways to Improve

Cultural Responsiveness Checklist



This self-assessment tool helps you think about your skills, knowledge, and awareness when working with different cultures. The goal is to identify ways to improve your effectiveness in working in diverse settings.

Cultural responsiveness means noticing and respecting the different cultures, values, and experiences people have – and using that understanding to help and support them better.

It means:

- Listening and learning about people's backgrounds
- Valuing their traditions, languages, and ways of life
- Changing how we teach, talk, or work to make everyone feel included and understood

Being culturally responsive helps build trust, makes people feel welcome, and allows everyone to succeed.

• How to Use This Tool:

Review the statements in the **Awareness, Knowledge, and Skills** sections. Select the response that best represents your experience:

Never = 1 point, Sometimes = 2 points, Fairly Often = 3 points, Always = 4 points

Awareness Statement	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
I think about my own culture and any biases I might have.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand how my cultural background affects my interactions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I acknowledge that my experiences may differ from others due to culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I consider how my culture shapes the way I make decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I listen carefully to learn about other cultures and viewpoints.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I notice when I make guesses or assumptions about other cultures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Knowledge Statement	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
I try to learn about cultures that are different from mine.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand that history and unfair systems affect different communities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I keep up with current cultural and social issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I know that cultural rules affect how people communicate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am aware of how privilege and power affect people in society.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Skills Statement	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
I change how I communicate to include everyone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I address cultural misunderstandings with respect and openness.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I support inclusivity at my work or in my community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I speak up against stereotypes and biases when I encounter them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I seek feedback on how to improve my cultural awareness.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring and Meaning:

Step 1: Add up your scores for each section. **Total Score: __ / 64**

Step 2: Higher scores indicate greater cultural responsiveness.

Step 3: Reflect on areas where you scored lower and set goals for improvement.



Lived Experience Leadership Opportunities Assessment

This tool helps you see how well your organization includes people with lived experience in leadership roles on advisory councils. Read each statement and decide how well it describes what your organization is doing right now. Think about how much your organization supports and offers leadership opportunities to people with lived experience.

Scoring Guide:

1 = Not Implemented, 2 = Needs Improvement, 3 = Partially Implemented, 4 = Fully Implemented

Creating a Supportive Environment:	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
Our space is welcoming, safe, and respectful for individuals with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We recognize and honor lived experience as a valuable form of expertise.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership offers mentorship and peer support to help individuals grow in their roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Leadership Roles and Responsibilities:	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
People with lived experience have the chance to take on leadership roles, like being a co-chair or facilitator.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership roles switch often so everyone has a fair chance to participate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members with lived experience help plan the meeting agenda and lead the discussions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Lived Experience Leadership Opportunities Assessment

Building Skills Through Training & Development:	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
We offer skill-building workshops to help people feel more confident.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training is available in sharing your story, speaking up for others, and being a leader.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We offer networking and mentoring opportunities to help people grow and become stronger leaders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Compensation & Recognition is Provided:	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
Individuals receive some form of payment for their contributions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Their work is openly recognized and celebrated with awards, events, or special shout-outs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members get chances to speak at important meetings and events outside the group.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Lived Experience Leadership Opportunities Assessment

Supporting People to Have Voice and Choice	Never (1)	Sometimes (2)	Fairly often (3)	Always (4)
People with lived experience help shape policies and programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People with lived experience take part in important planning talks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People with lived experience lead efforts and work to bring about system changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total Score: _ _ / 40

What your Score Means:

30 - 40	20 - 29	10 - 19	0 - 9
Your organization provides strong leadership opportunities-keep up the good work and continue improving.	There are some leadership opportunities, but more work is needed.	Leadership opportunities are limited. Focus on important areas to improve.	Very few or no leadership opportunities. Action is needed right away.





**Virginia
HEALS**

*Caring Collaboration,
Empowering Families*

Trauma-Informed Agency Self-Assessment

Purpose

The purpose of the Trauma-Informed Agency Self-Assessment is to provide a starting place for agencies and systems from a variety of fields, including child welfare, behavioral health, public health, juvenile justice, education, early childhood development, housing, and victim advocacy, to assess where they fall in a continuum of trauma-informed care and to engage them in a process of setting agency improvement goals. The self-assessment identifies organizational milestones and priority areas for inspiring active planning and is not intended as a measure of individual performance or data collection tool. The goal is to stimulate intra-organization dialogue on how agencies and systems can increase their collective resolve and systematically engage in on-going advancement of trauma-informed care and practice.

How to Administer the Agency Self-Assessment

The framework is organized into ten domains drawn from a variety of disciplines, including health care, behavioral health, child welfare, housing, and advocacy.¹ Within each domain are various operational criteria about which agencies can self-determine their level of proficiency. Recognizing that the process of becoming trauma-informed is a continuous one, the self-assessment is solely intended as a tool for agencies to identify strengths, weaknesses, and opportunities for further development.

The five steps for completing the self-assessment are 1) agency staff completes the assessment instrument; 2) staff review the results and, where warranted, facilitate a discussion about why they scored each domain/criteria as they did and any individual variance between the ratings; 3) the vetted results are synthesized for review by a trauma informed workgroup, management team, or other appropriate staff; 4) staff select and prioritize which domain(s) should be the focus for improvement for a given time period; 5) staff discussions are facilitated to help identify the need for potential discipline-specific assessments and to prioritize resource allocation and training needs. (An Action Planning Tool for agencies to guide this process is included in Appendix A.)

Resources

Recognizing that the process of becoming trauma-informed is a continuous one, a list of system-specific resources is provided in an appendix at the end of the self-assessment (Appendix B). This resource list is not exhaustive, but is offered as a starting point to take a more comprehensive approach to the on-going work of advancing trauma-informed care and practice in your organization or system.

Definitions

Trauma: Individual trauma results from an **event**, series of events, or set of circumstances that is **experienced** by an individual as physically or emotionally harmful or life threatening and that has lasting adverse **effects** on the individual's functioning and mental, physical, social, emotional, or spiritual well-being.

A trauma-informed program, organization, or system is one that:

1. **Realizes** the widespread impact of trauma and understands potential paths for recovery;
2. **Recognizes** the signs and symptoms of trauma in clients, families, staff, and others involved with the system;
3. **Responds** by fully integrating knowledge about trauma into policies, procedures, and practices; and
4. Seeks to actively resist **re-traumatization**.

Vicarious trauma, also referred to as secondary trauma, is the exposure to the trauma experiences of others and is an occupational challenge for those who have experienced violence and/or trauma. Working with victims of violence and trauma changes the worldview of responders and puts individuals and organizations at risk for a range of negative consequences. A **vicarious trauma-informed agency or system** recognizes these challenges and proactively addresses the impact of vicarious trauma through policies, procedures, practices, and programs.

Historical trauma is often described as multigenerational trauma experienced by a specific racial, ethnic, cultural, or marginalized group. Historical trauma can be experienced by anyone living in families at one time marked by severe levels of trauma, poverty, dislocation, war, etc., and who are still suffering as a result.

A. Leadership and Mission

Instructions: Please indicate the level of agency adoption for each TI attribute statement below.

A1. The agency's guiding principles and strategic plans (vision, mission, and goals) reflect a commitment to providing trauma-informed services and supports.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

A2. The agency's leadership actively solicit input in internal meetings concerning trauma and how policies and practices (services) can promote healing.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

A3. The agency's leadership intentionally and consistently engage with and solicit input from individuals with lived experience.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

A4. The agency's leadership model a healthy life/work balance.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

A5. The agency's leadership are aware of the importance of cultural humility and responsiveness and incorporate this awareness into daily practice and organizational operations.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

A6. Members of the agency's governing bodies (e.g., leadership teams and governing board/committee) reflect the diverse identities of the communities that are served.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

TRAUMA-INFORMED AGENCY SELF-ASSESSMENT

n/a

B. Management and Supervision

B1. The agency's decisions are made in collaboration with all staff and conducted with transparency.

not at all minimally moderately significantly fully n/a

B2. The agency's decisions are made in ways that build trust, and invite and maintain shared power among staff, clients, and family members of those receiving services.

not at all minimally moderately significantly fully n/a

B3. The agency has regularly scheduled individual and/or group check-ins to discuss specific cases, projects, and the impact of the work on staff and volunteers.

not at all minimally moderately significantly fully n/a

B4. Supervision time is used to help staff members and volunteers understand vicarious trauma and how it may impact their work with children, families, and individuals..

not at all minimally moderately significantly fully n/a

B5. Support is readily available and accessible to staff and volunteers following a challenging, and/or critical incident.

not at all minimally moderately significantly fully n/a

B6. The agency engages in recruitment and hiring strategies to develop a staff and volunteer force that reflects the diversity of the children, families, and individuals being served.

not at all minimally moderately significantly fully n/a

TRAUMA-INFORMED AGENCY SELF-ASSESSMENT

n/a

C. Policy

- C1. The agency's written policies, procedures, and forms clearly demonstrate a commitment to diverse identities and cultural and linguistic differences.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- C2. The agency's written policies, procedures, and forms clearly demonstrate support of both the mental and physical health and wellness of staff and volunteers.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- C3. The agency has written policies and procedures outlining emergency responses to crisis situations (e.g., self-harm, suicidal thinking, aggression) involving both staff and the children, families, and individuals being served.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- C4. When reviewing and updating policies, procedures, and forms, the agency includes and incorporates input from children, youth, and individuals with lived experience.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- C5. The agency routinely reviews and updates its policies, procedures, and forms to determine whether they are sensitive to the needs of trauma survivors and use current trauma-informed language.

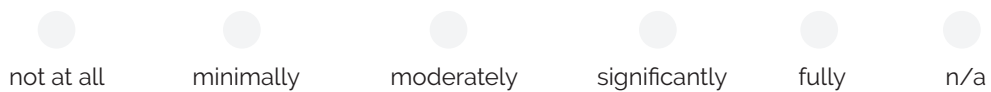
☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- C6. When reviewing and updating policies, procedures, and forms, the agency involves front-line staff, including those providing direct services and administrative professionals.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

C. Policy *continued*

C7. The agency's policies and practices promote team building and supportive relationships among all staff.



Comments (examples of successes and/or opportunities for change):

D. Environment

- D1. The agency's environment promotes a sense of safety and calm for children, youth, and individuals being served.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- D2. The agency's environment promotes a sense of safety and calm for staff.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- D3. The agency's waiting/reception areas are designed and furnished to promote dignity and inclusion, have child-friendly features, and solicit youth voice in their design.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- D4. The agency's environment reflects and incorporates different cultural perspectives through artwork, diverse reading material, etc.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- D5. There are written policies and procedures in place outlining how the agency will address potential threats to children, youth, individuals, and staff from natural or human-made threats (e.g., fire, tornado, hostile intruder).

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- D6. The agency demonstrates appreciation for employee efforts in meaningful ways (e.g., public recognition, notes in personnel files, promotions).

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

Comments (examples of successes and/or opportunities for change):

E. Accessibility

- E1. The agency has a detailed accessibility plan to address the agency's response to service requests from children, families, and individuals being served, regardless of language, ability, sexual orientation, gender identity and expression, and/or religion.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- E2. There are written policies and procedures on interpretation and translation services and training on these language access policies occurs routinely.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- E3. The agency provides services that engage and are accessible and affirming to linguistically, ethnically, racially, and culturally diverse groups.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- E4. The agency provides services that engage and are accessible and affirming to LGBTQ+ children, youth, and individuals.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- E5. The agency provides services that engage and are accessible to frequently underserved populations (e.g., people experiencing homelessness, people with disabilities, refugee families).

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- E6. The agency's staff feel safe coming forward to discuss issues related to age, gender, gender identity, sexual orientation, race, religion, ability, etc.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

Comments (examples of successes and/or opportunities for change):

F. Engagement

Youth Engagement

- F1. The agency provides children and youth routine opportunities to voice needs, concerns, and feedback.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- F2. The agency specifies how children and youth will be prepared for service meetings and other case planning meetings.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- F3. The agency specifies how meetings and/or information developed for children and youth will be age and developmentally appropriate.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

Family Engagement

- F4. The agency includes all forms of family to help identify connections, recognizing that some people who play the most supportive roles in a child or youth's life may not be legally related.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- F5. The agency provides family members routine opportunities to voice needs, concerns, and feedback.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- F6. The agency specifies how efforts will be made to schedule meetings with family members at a time, location, and setting that will be accessible and accommodate their needs.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

TRAUMA-INFORMED AGENCY SELF-ASSESSMENT

● not at all ● minimally ● moderately ● significantly ● fully ● n/a

● not at all ● minimally ● moderately ● significantly ● fully ● n/a

G. Cross-System Collaboration

TRAUMA-INFORMED AGENCY SELF-ASSESSMENT

- G1. Strategies are in place to identify, communicate, and work with community partners and referral agencies that have proven experience delivering evidence and trauma-informed services.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- G2. The agency informs clients about the extent and limits of privacy and confidentiality (e.g., the kinds of records that are kept, where they are kept, who has access to this information, and when the program is obligated to report information to child welfare or police).

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- G3. Mechanisms are in place to promote cross-system training on trauma and trauma-informed approaches.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

- G4. The agency develops strategies that promote cross-system training and collaboration with non-traditional, culturally-specific, community-based, and/or grass-roots organizations.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

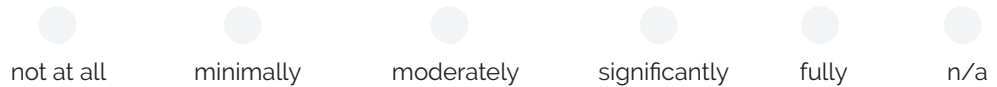
- G5. Cross-system training is organized in a neutral location that is comfortable to all participants.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

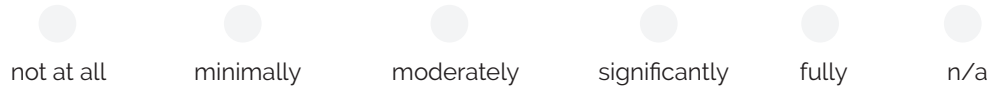
Comments (examples of successes and/or opportunities for change):

H. Screening, Assessment, and Treatment Services

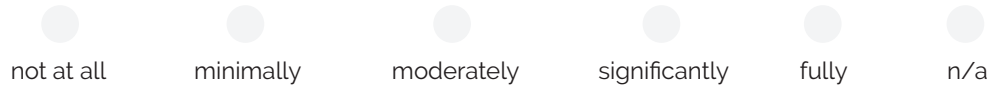
H1. Timely and universal (is administered to everyone) trauma-informed screening and assessment is available and accessible to children, youth, and individuals being served.



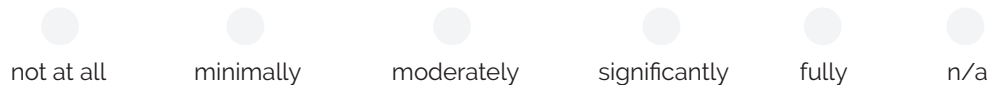
H2. The screening/assessment tools used by the agency include/acknowledge historical trauma.



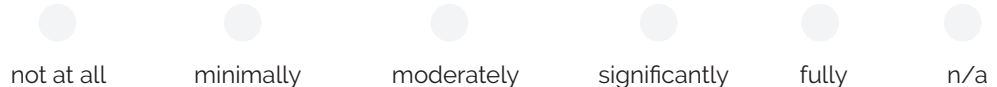
H3. The agency has the capacity to provide or make timely referrals to a continuum of trauma-informed interventions for children, youth, and individuals being served.



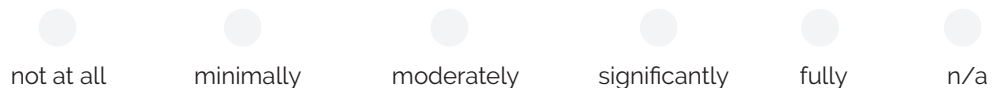
H4. An individual's own definition of emotional safety is included in treatment and safety plans.



H5. Staff members incorporate motivational interviewing techniques with children, youth, and individuals being served (e.g., open-ended questions, reflective listening).



H6. A continuum of trauma-informed interventions is available within the agency to support children, youth, and individuals being served.



I. Training and Workforce Development

11. The agency provides orientation for new staff and volunteers on their job role and tasks.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

12. The agency ensures that all staff (direct care, supervisors, front desk and reception, support staff, housekeeping, and maintenance) receives basic training on trauma, its impact, and strategies for trauma-informed approaches across the agency and across personnel functions.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

13. Training and resources are provided to supervisors on incorporating trauma-informed practice and supervision in their work.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

14. The agency provides training and education for staff and volunteers on vicarious trauma and supports strategies to address work related stress and vicarious traumatization.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

15. The agency provides training and education for staff and volunteers that enhance cultural humility and responsiveness.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

Comments (examples of successes and/or opportunities for change):

J. Evaluation and Quality Assurance

TRAUMA-INFORMED AGENCY SELF-ASSESSMENT

J1. There is a routine practice in place of measuring the agency's performance in being trauma-informed (e.g., an organizational assessment).

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

J2. There is a routine practice in place to evaluate whether staff members feel safe and valued at the agency.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

J3. Children, families, and individuals being served are given opportunities to evaluate the program and offer their suggestions for improvement in anonymous and/or confidential ways (e.g., suggestion boxes, regular satisfaction surveys, etc.)

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

J4. People with lived experience are invited to share their thoughts and ideas about their experiences with the agency.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

J5. There are mechanisms in place for feedback and other information collected to be incorporated into the agency's quality assurance processes.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

J6. The agency incorporates attention to culture and trauma in agency operations and quality improvement processes.

☐ not at all
 ☐ minimally
 ☐ moderately
 ☐ significantly
 ☐ fully
 ☐ n/a

Comments (examples of successes and/or opportunities for change):

Appendix A

Action Planning Tool

[illegible]

Appendix B:

System-Specific Resources

Advocacy

Building Cultures of Care: A Guide for Sexual Assault Services Programs (Sexual Assault Demonstration Initiative)

https://www.nsvrc.org/sites/default/files/2017-10/publications_nsvrc_building-cultures-of-care.pdf

Tools for Transformation: Becoming Accessible, Culturally Responsive, and Trauma Informed Organizations

http://www.nationalcenterdvtraumamh.org/wp-content/uploads/2018/04/NCDVTMH_2018_ToolsforTransformation_WarshawTinnonCave.pdf

Behavioral Health

SAMHSA's Concept of Trauma and Guidance for a Trauma-Informed Approach (Substance Abuse and Mental Health Services Administration)

https://ncsacw.acf.hhs.gov/userfiles/files/SAMHSA_Trauma.pdf

Trauma-Informed Care in Behavioral Health Services (Substance Abuse and Mental Health Services Administration)

<https://www.ncbi.nlm.nih.gov/books/NBK207201/>

Child Welfare

Child Welfare Trauma Training Toolkit (National Child Traumatic Stress Network)

<https://www.nctsn.org/resources/child-welfare-trauma-training-toolkit>

Trauma-Informed Child Welfare Practice Toolkit (Chadwick Trauma-Informed Systems Dissemination and Implementation Project)

<https://ctisp.wordpress.com/trauma-informed-child-welfare-practice-toolkit/>

Courts/Justice

Resource Guidelines: Improving Court Practice in Child Abuse and Neglect Cases

<https://www.ncjfcj.org/publications/enhanced-resource-guidelines/>

Preparing for a Trauma Consultation in Your Juvenile and Family Court

https://www.ncjfcj.org/wp-content/uploads/2015/03/NCJFCJ_Trauma_Manual_04.03.15.pdf

Appendix B:

System-Specific Resources

Education

Child Trauma Toolkit for Educators (National Child Traumatic Stress Network)

<https://www.nctsn.org/resources/child-trauma-toolkit-educators>

Issue Brief: Trauma-Informed Schools (Family & Children's Trust Fund of Virginia)

<http://www.fact.virginia.gov/wp-content/uploads/2017/04/FACT-ISSUE-BRIEF-TRAUMA-INFORMED-SCHOOLS-final1.pdf>

Health Care

Trauma Informed Care in Child Health Systems (American Academy of Pediatrics)

<https://publications.aap.org/pediatrics/article/148/2/e2021052579/179781/Trauma-Informed-Care-in-Child-Health-Systems>

Issue Brief: Key Ingredients for Successful Trauma-Informed Care Implementation (Center for Health Care Strategies)

http://www.chcs.org/media/ATC_whitepaper_040616.pdf

Housing

Trauma-Informed Organizational Toolkit for Homeless Services (National Center on Family Homelessness)

https://www.air.org/sites/default/files/downloads/report/Trauma-Informed_Organizational_Toolkit_0.pdf

Issue Brief: Trauma-Informed Practices in Homeless Intervention Services (Family & Children's Trust Fund of Virginia)

<http://www.fact.virginia.gov/wp-content/uploads/2017/11/FACT-ISSUE-BRIEF-TRAUMA-INFORMED-Homeless-Intervention-FINAL.pdf>

Juvenile Justice

Think Trauma: A Training for Staff in Juvenile Justice Residential Settings (National Child Traumatic Stress Network)

<https://www.nctsn.org/resources/think-trauma-training-staff-juvenile-justice-residential-settings>

A Trauma Primer for Juvenile Probation and Juvenile Detention Staff (National Council on Juvenile and Family Court Judges)

<https://www.ncjfcj.org/wp-content/uploads/2015/08/NCJFCJ-Trauma-Primer-Final-10.08.15.pdf>

Appendix C: Additional Resources

A Guide to Trauma Informed Supervision

https://pcar.org/sites/default/files/resource-pdfs/trauma_informed_supervision_guide_508.pdf

Competency-Based Supervision for the 21st Century:

Trauma-Informed Supervision

<https://www.lpcaga.org/assets/docs/CPCS/Trauma%20Supervision%20Workshop%20Macon%202018%20by%20Diane%20Levy.pdf>

Notes:

This document utilizes, adapts, and expands upon a compilation of definitions, domains and items from the Substance Abuse Mental Health Services Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach (2014), Southwest Michigan Children's Trauma Assessment Center's Trauma Informed Systems Change Instrument (2010), the National Center on Family Homelessness' Trauma-Informed Organizational Self-Assessment and "Creating Cultures of Trauma-Informed Care: A Self-Assessment and Planning Protocol" and Virginia HEALS' Policy Review Tool and RFA/RFA Checklist.

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