Clifford Beers
Community Care Center
A Clifford Beers Community Health Partner

Becoming a Trauma-Informed, Anti-Racist Organization:

Lessons Learned and Promising Approaches from the Clifford Beers Learning Collaborative Experience

Becoming a Trauma-Informed, Anti-Racist Organization: Lessons Learned and Promising Approaches from the Clifford Beers Learning Collaborative Experience

Yohanna Cifuentes, PhD, LCSW | Jen Agosti, MPP | Elizabeth A. Thomspon, PhD | Brianna Dunn, MPH

TABLE OF CONTENTS

DEDICATION

This report is dedicated to Maria Elena Oliva, PhD, LCSW, who served as a coach for the Learning Collaborative.Her passing was a profound loss, both personally and professionally, to the LC community. Her warmth, humor, candor, and encouragement to "call a thing a thing" inspired us all to continue to pursue trauma-informed, anti-racist transformation for children, families, and communities. We miss her greatly and are forever grateful for the gifts that she so generously gave.

Part 1 Executive Summary

Founded in 1913, Clifford Beers Community Care Center (CB or "the Center") is the nation's oldest outpatient mental health clinic. Focused on children and families, the Center provides an integrated spectrum of programs and services that reduce chronic stress, build healthy and supportive connections, and facilitate family stability in Greater New Haven, Connecticut. In 2021, the agency was awarded a five-year grant from the Substance Abuse and Mental Health Services Administration (SAMHSA) as part of the National Child Traumatic Stress Network (NCTSN or "the Network") to develop a Trauma-informed, Anti-racist (TIAR) Whole Family Approach to Care. A key strategy utilized in pursuit of this goal is the Learning Collaborative (LC or "Collaborative"), an evidence-informed methodology for supporting practice change among teams of peers and recognized experts. The Learning Collaborative method has been used to facilitate quality improvement and implementation in behavioral health since 2005.[1]

While the grant called for leading Learning Collaboratives to implement TIAR Whole Family Approaches to Care among various organizations in New Haven, an internal Learning Collaborative within CB took place first, from January to October 2023. This process served as the foundation for an organization-wide undertaking focused on trauma-informed, anti-racist practice, which also incorporated intensive training initiatives.

This summary of CB's TIAR Learning Collaborative experience highlights key lessons learned and promising approaches that emerged. It is intended as a resource for other organizations striving to become trauma-informed, anti-racist organizations. Reflections and lessons described in this document are offered with vulnerability and humility as, unlike most organizational reports, it does not only share successes. The authors strive to embody a TIAR approach by being transparent about the behaviors, practices, actions, and structures that perpetuated, rather than deconstructed, racism and White Supremacy Culture (WSC). For a brief chronology of the CB trauma-informed, anti-racist journey prior to the Learning Collaborative, see the overview in Appendix A.

The initial goal of this effort was to deepen, build upon, and help sustain CB's goal of becoming a TIAR organization. There were a number of behaviors and responses that suggested important progress resulted from this effort:

- Raised knowledge and awareness among participants about WSC, racism, and the identification of where the wounds are;

- Raised knowledge and awareness of the prevalence and impacts of racism on staff who identify as Black, Indigenous, and People of Color (BIPOC)[2];

- Made the implicit, unspoken, unheard, and sometimes devalued or dismissed experiences of BIPOC staff explicit, heard, recognized, and out in the open;

- Elevated the NCTSN Principles of TIAR organizations[3] and infused them into job descriptions, organizational expectations, meeting structures, and individual behavior (e.g., staff asking one another in organic ways, "Are we centering the voices of those most impacted?" and "Are those most impacted in the room right now?");

- Brought the language of "trust," "harm," and "healing" to the forefront as key issues to be addressed in order to dismantle racism within the organization;

1 Learning collaboratives: A strategy for quality improvement and implementation in behavioral health. Journal of Behavioral Health Services & Research, 50(2), 263–278. https://doi.org/10.1007/s11414-022-09826-z

2. We acknowledge that language when discussing identity and shared experience in the context of oppression is evolving and always imperfect. More information about the term "BIPOC" and the complexity of language related to race and white supremacy is available from The BIPOC Project website www.thebipocproject.org and Constance Grady's article "Why the term "BIPOC" is so complicated, explained by linguists" at https://www.vox.com/2020/6/30/21300294/bipoc-what-does-it-mean-critical-race-linguistics-jonathan-rosa-deandra-miles-hercules

3. Powell, W., Agosti, J., Bethel, T.H., Chase, S., Clarke, M., Jones, L.F., Lau Johnson, W.F., Noroña, C.R., Stolbach, B.C., & Thompson, E. (2022). Being anti-racist is central to trauma-informed care: Principles of an anti-racist, trauma-informed organization. Los Angeles, CA & Durham, NC: National Center for Child Traumatic Stress. https://www.nctsn.org/resources/principles-of-an-anti-racist-trauma-informed-organization

- Helped identify what work needs to be done, along with concrete strategies to accomplish this work, that promotes trust, addresses past and current harm, prevents future harm, and nurtures healing for BIPOC staff;

- Created structures (defined and focused workgroups) to continue this work, focused on implementing the concrete strategies identified by BIPOC staff.

We also witnessed an overall increase in Learning Collaborative participants' ability and willingness to have more difficult, honest, and direct conversations. Indeed, this effort "pulled back the curtain" on what many BIPOC staff report experiencing, making their issues related to trust and harm open and explicit. This exposure reflects progress – albeit painful progress – toward becoming anti-racist and trauma-informed. The process was far from perfect; however, important takeaways were identified along the way. These include:

1. **Learning Collaborative Methodology:** The Learning Collaborative methodology alone is not a sufficient approach to address the complexity of TIAR transformation. While elements of the Learning Collaborative methodology can provide helpful approaches, structures, and tools, these must be thoughtfully sequenced and contextualized to embody anti-racist approaches.

2. **Sequencing of Training:** The sequencing of training activities is critical, with trust and community-building serving as essential precursors to meaningful anti-racist work.

3. **Readiness Indicators:** Indicators of whether an organization is "ready" to undertake meaningful TIAR work are both individual and organizational, and include: timing of the effort and whether there are competing organizational priorities and demands; resource allocations and ability to protect time for staff; individual staff competencies related to TIAR work; alignment of the work with the organization's values, beliefs, and behaviors; and overall assessed organizational readiness related to transformational change.

4. **Leadership:** Leadership for this work must strive to embody the NCTSN TIAR Principles in authentic, open, transparent, explicit, continuous, and humble ways.

5. **Burden and Harm:** The journey creates additional burdens for BIPOC staff, who may not want to engage in anti-racist work that may be performative, or even harmful, as it unfolds. Organizational support, as identified by BIPOC staff, should be put in place in order to give choice as well as to mitigate any potential harm and provide opportunities for support and healing. When harm occurs, clear, transparent, and meaningful approaches to address it and support healing are essential.

6. **Team-Based Work:** Organizational change happens through a combination of individual behavior changes, practice and policy changes, and structural changes, all which can be facilitated, promoted, and sustained through organizationally-based teams. Thus engaging, preparing, and supporting teams that will serve as champions and leaders of this work is important.

7. **Organizational Change:** Organizations are always in flux, with continuous internal and external opportunities and challenges. These can serve as facilitators or inhibitors of this work and must be well understood and anticipated prior to – and throughout – the effort.

8. **Measuring Impact:** Measures for whether the effort is making a difference for those most impacted: the BIPOC children, families, and community being served, as well as BIPOC staff, should be established up front. How will the organization know if anyone is better off as a result of the work? Who will be better off? Who will define what "better off" means? These are questions that should be answered early in the process so that clear indicators of progress are identified and tracked.

A critical note for organizational leaders interested in applying these lessons: this journey is neither direct nor simple, and relies on reflective and courageous leadership. Twists, turns, detours, and obstacles are to be expected regardless of the starting point or advance preparation. Overall, the process of becoming a TIAR organization must be designed for the long haul, as there is no way to turn it off once it has begun. There will be progress and setbacks. But unless teams are satisfied with the way things are now, there really is no other choice than to do the work. Ultimately, despite the obstacles CB faced along the way, the unlearning, deconstruction, and reconstruction profoundly impacted CB staff and its work to support children and families.

Part 2 What We Did

Before the Learning Collaborative

Clifford Beers began the journey to become a trauma-informed organization upon joining the NCTSN in 2005. The Network supports expanding access to and improving the quality of trauma services for children and families via training, resource sharing, and facilitated cross-site collaboration.

In 2016, CB began to focus intentionally on racial justice issues, first by facilitating Conversations About Racial Equity (CARE). The goal was to facilitate an internal organizational conversation on internal and external racism; to create an action plan and yearly trajectory to tackle racism and discrimination; to be more attentive to racism and trauma when caring for families; and to be intentional about this work. Strategies included training in cultural competence, privilege, oppression, and human resource strategies to hire and retain BIPOC staff.

In 2017, CB participated in a six-month Technical Assistance Program through the Connecticut Network of Care Transformation (CONNECT), which focused on developing a Health Equity Plan that meets the federal Office of Minority Health's Culturally and Linguistically Appropriate Services (CLAS) Standards. The Health Equity Plan is intended to advance principles of health equity, improve the quality of care and services, and help eliminate health disparities. CB senior leaders and program directors further participated in the Promoting Racially Just Trauma-Informed Pediatric Integrated Care Collaborative (RJTI-PICC) Breakthrough Series Collaborative from May through November 2021. This Collaborative was facilitated by Johns Hopkins Bloomberg School of Public Health as part of an NCTSN-funded initiative to implement trauma-informed and anti-racist organizational, cultural, and clinical practices. CB's participation in this initiative informed the design thinking for the Learning Collaborative documented in this report.

CB's 2021 NCTSN grant award focused entirely on "Trauma-Informed, Anti-Racist (TIAR) Whole Family Approach to Care." The projects funded through this grant seek to integrate "whole family" considerations and anti-racist practices into a trauma-informed mental health service system design. This design aims to ensure that trauma treatments are responsive to inequity and sensitive to systemic racism, and that care is contextualized to the needs of the people served. The grant includes additional goals related to increased access to trauma-informed care; creating a faith-based model of care; developing and sustaining an infrastructure to support anti-racist structures within current evidence-based trauma treatments; and engaging and partnering with the community to achieve racial justice.

As part of the first goal to enhance service system design, objectives included implementing an internal Learning Collaborative designed to make agency services more trauma-informed and reflective of anti-racist practices. CB brought in two consultants, Dr. Elizabeth Thompson and Jen Agosti (one Black woman and one white woman) with extensive experience in both anti-racist organizational transformation and the Learning Collaborative methodology to partner and help lead this effort. These consultants worked closely with Dr. Yohanna Cifuentes, CB's Vice President of Anti-Racist Practice, who led the entire NCTSN grant. Together with Brianna Dunn, the Program Evaluator, these four formed the LC Planning Team.

Separate from, but concurrent with the LC, CB was undergoing significant organizational restructuring. A new entity, Clifford Beers Community Health Partners ("Health Partners"), was established in 2022 as a Managed Service Organization (MSO), or shared services center for a network of independent nonprofit organizations. Clifford Beers Community Care Center became one of the MSO affiliates, alongside two other organizations. Several senior staff from CB migrated to Health Partners, while others remained in CB. Given the size and complexity of CB, as well as existing working relationships among staff, there was confusion about roles, responsibilities, and boundaries. In addition, questions about the hierarchical positioning of Health Partners – whether as a top-down "parent" organization or bottom-up service entity – emerged as antithetical to anti-racist practice. The conflation of these organizational changes with change efforts in the LC proved especially difficult to manage, and underscores the need to carefully assess timing and readiness when embarking upon this type of effort.
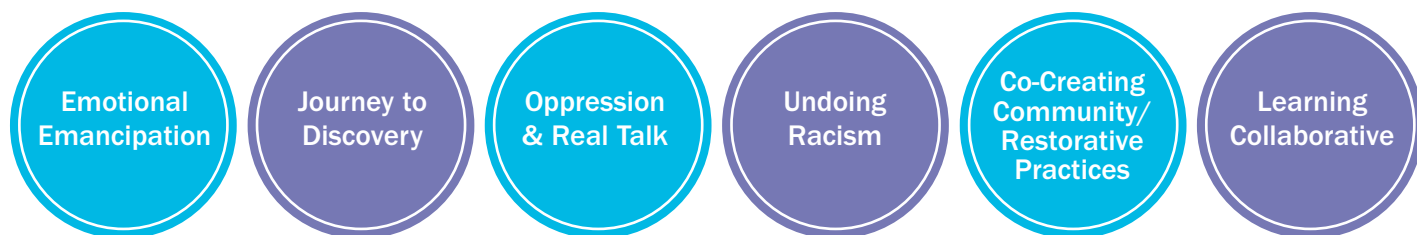
Training

Immediately prior to, as well as concurrent with the LC, CB engaged in several TIAR-related training work-shops and other efforts. Many of these efforts engaged all CB staff, not only those who were participating in the LC. The diagram below shows these various TIAR trainings and efforts within CB from 2022-2023. (More details on each of the efforts is provided in Appendix B.)

- **Emotional Emancipation Circles:** A culturally grounded self-help support group process, developed by Community Healing Network in collaboration with the Association of Black Psychologists (ABPsi), to help Black people heal from the trauma caused by the lie of inferiority and work together to be free from it—once and for all.

- **A Journey of Discovery:** On the Humanity of Black People: A series of radically honest intra-racial and/or inter-racial conversations focused on the root cause of anti-Black racism and pathways to genuine healing.

- **Oppression and Real Talk:** Understanding the Cycle of Oppression: A conversation that unpacks how systems perpetuate racism (ism's) through the 5 I's of Oppression - Ideological, Institutional, Interpersonal, Internalized Oppression, and Internalized Dominance.

- **Undoing Racism® Community Organizing Workshop:** Participants experience a humanistic process for laying a foundation to explore how they have been racialized, socialized, and conditioned to think about race and racism.

- **Co-Creating Community/Restorative Practices:** Using a restorative justice framework, coming together in a circle to purposefully capitalize on the natural human need to be in community.

Spaces were also created to support employees in their learning journeys. For example, a "What to Expect" session was held before Undoing Racism workshops, recognizing that employees were having strong reactions to the workshop material. The TIAR team also opened spaces right after the workshop each day, so that employees could access support if needed. A debrief meeting was also created to discuss employees' reactions about a week after the workshop.

Clifford Beers Sustained, Intentional Commitment to TIAR
ALL DONE WITHIN THE CONTEXT OF MAJOR ORGANIZATIONAL CHANGES

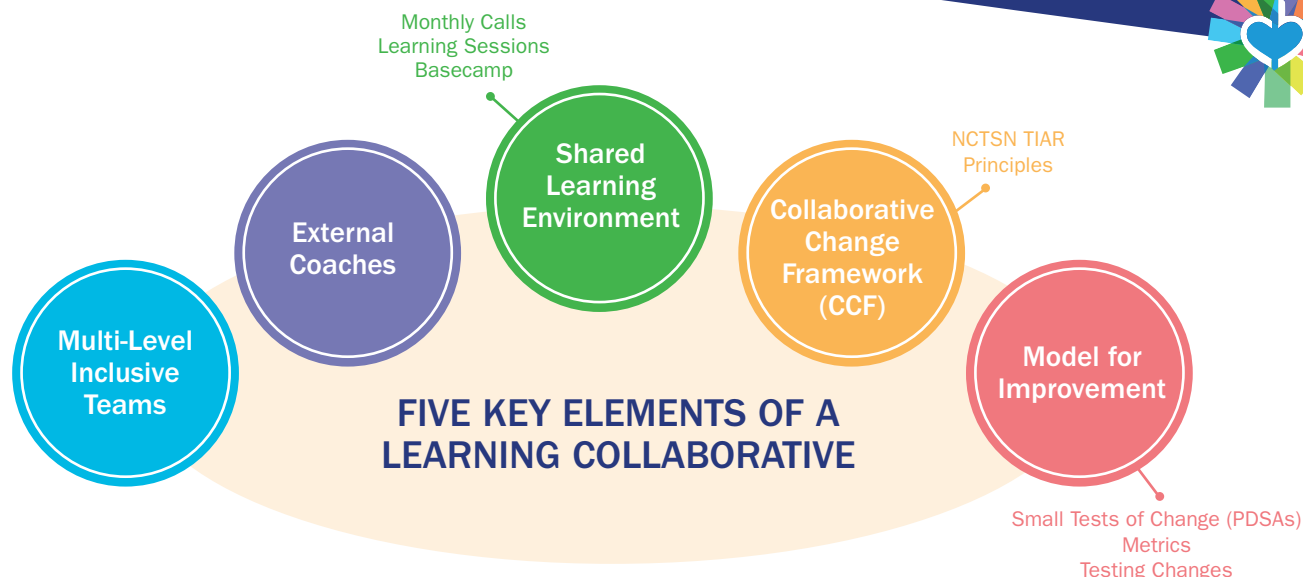| Emotional Emancipation	Journey to Discovery	Oppression & Real Talk	Undoing Racism	Co-Creating Community/ Restorative Practices	Learning Collaborative

Learning Collaborative Methodology

The LC methodology is an adaptation of the Institute for Healthcare Improvement (IHI) Breakthrough Series Collaborative model[4]. It has been used extensively within the NCTSN since 2005, with the goal of taking "what we know" (from training) to "what we do" (implementation and action). Its primary objectives are to:

- Create shared language, vision, and priorities
- Test and implement ideas
- Use data to assess progress and guide priorities
- Become and bring in others to serve as champions

- Develop networks across teams and break down silos
- Spread successes ("scale up")
- Plan for sustainability

4. The breakthrough series: IHI's collaborative model for achieving breakthrough improvement. Boston: Institute for Healthcare Improvement; 2003. https://www.ihi.org/resources/white-papers/breakthrough-series-ihis-collaborative-model-achieving-breakthrough

FIVE KEY ELEMENTS OF A LEARNING COLLABORATIVE

Multi-Level Inclusive Teams

External Coaches

Shared Learning Environment — Monthly Calls, Learning Sessions, Basecamp

Collaborative Change Framework (CCF) — NCTSN TIAR Principles

Model for Improvement — Small Tests of Change (PDSAs), Metrics, Testing Changes

Five key elements distinguish the LC from other implementation models. Each element is detailed below. The LC at CB was planned and facilitated by the authors of this guide: Dr. Yohanna Cifuentes, Vice President of Anti-Racist Practice at CB; Brianna Dunn, the Program Evaluator; and two external consultants, Dr. Elizabeth Thompson and Jen Agosti. A more detailed overview of this Learning Collaborative, including key areas of focus from each Learning Session, can be found in Appendix C.

i. Multi-Level Inclusive Teams

The Collaborative was composed of working teams that designed and tested changes within their spheres of influence. Orientation to the LC was delivered to managers, program directors, supervisors, and all staff in various ways over several months, including small meetings, all-staff meetings, emails, and other written communications. Many discussions were held about the need for staff to be volunteers in this process, as it would require dedicated time and energy. All staff were invited to participate and, if interested, seek approval from their supervisors. Participation was fully voluntary and included staff at all levels of the organization. Supervisor permission was required since participation would add to staff members' existing workload. Seven teams were created, with 5-10 staff members per team. A total of 49 participants represented 20% of the total staff at CB. Each team had representatives from different departments and/or programs and participating staff on those teams had different levels of experience and authority within the organization. One team was a cross-program team that included supervisors and managers across departments.

ii. External Coaches

All LCs engage external content coaches who reflect diverse identities, organizational levels, and have the various types of expertise called upon in the Collaborative Change Framework. This group, typically four to eight individuals, serves as practice experts for the overall LC, as well as coaches and mentors to teams, internal consultants to the leadership and planning team, facilitators of check-in calls and Learning Sessions, and overall champions of the work. CB engaged eight coaches, with at least two providing expertise in each of the four Principle clusters. (Brief biographies of these coaches are provided in Appendix D.) The group of coaches included some community members who acknowledged lived expertise with child trauma, some with experience in racial justice and anti-racism work, others with expertise in organizational change efforts, and others with diverse perspectives on leadership, coaching, and facilitation. Over the course of the LC, the group developed their own close network as a team, as they brought together varied professional and personal expertise; explored the complexity of trauma-informed, anti-racist work; facilitated and supported individuals, teams, and groups; engaged in and led critical conversations about racism; and provided valuable input and feedback into all planning efforts. It is significant to note that roughly six months into this LC, one of the coaches unexpectedly passed away. This had a collective impact on the coaches' group, as well as on participants in the LC. Space was held for celebrating her and her contribution at the final Learning Session.

iii. Shared Learning Environment/Community

A shared learning community is key for Learning Collaboratives. The work cannot be done in isolation and there are several structures and processes created intentionally to support the sharing and relationships both within and across teams. For this LC, the structures included three two-day in-person Learning Sessions, an interactive website that allowed the sharing of documents and threaded discussions (Basecamp), monthly all-team calls, monthly calls with the designated leaders of each team, and quarterly calls with the internal CB leadership. Within each of these structures, discussions and activities aimed to share successes and challenges across teams, promote collaboration, facilitate relationship building, and provide opportunities to spread successes.

iv. Collaborative Change Framework

A Collaborative Change Framework (CCF) is a document that serves as the content anchor for all teams participating in the LC. It is a touchstone that describes what teams need to do in order to achieve their goals; however, it does not prescribe how they should go about doing so. In this LC, the CCF was the NCTSN's *Being anti-racist is central to trauma-informed care: Principles of an anti-racist, trauma-informed organization*[5] (see Appendix E). In this document, 14 Principles are divided into four clusters that were used to organize the LC's areas of focus and teams' small tests of change. The 14 Principles are intentionally focused on anti-Black racism and the document provides a comprehensive rationale for this. The Principles are identified with this icon throughout this document.

CLUSTER 1	CLUSTER 2	CLUSTER 3	CLUSTER 4
Bearing Witness, Centering Voices & Honoring Lived Experience	Organizational Values, Governance, & Strategic Oversight	Structural Reforms, Partnerships, & Systems Change	Human Resources, Staff Support, & Leadership Development

v. Model for Improvement

The Model for Improvement[6] helps participants and teams frame the changes that they hope to test by encouraging them to ask three questions: 1) What are we trying to accomplish? 2) How will we know our changes are resulting in improvements? 3) What changes can we test that will result in improvements? From these questions, participants proceed to test their ideas – some as broad strategies and some, when appropriate, through small rapid tests of change, called Plan-Do-Study-Act (PDSA) cycles. These PDSAs help participants at all levels move immediately to action. Anyone on a team can carry out a PDSA and "permission" is generally not required, so power and hierarchies become less relevant. Because PDSA cycles are used as an implementation strategy, the first cycle is intended to be very small, simply testing the merit of an idea with a few people. Each subsequent cycle should grow in scale or size, with lessons learned in the previous cycles used to adapt the practice, tool, or process being tested, continuously studying the results to make sure that changes are resulting in the anticipated improvements.

5. Powell, W., Agosti, J., Bethel, T.H., Chase, S., Clarke, M., Jones, L.F., Lau Johnson, W.F., Noroña, C.R., Stolbach, B.C., & Thompson, E. (2022). Being anti-racist is central to trauma-informed care: Principles of an anti-racist, trauma-informed organization. Los Angeles, CA & Durham, NC: National Center for Child Traumatic Stress.

6. Langley, G.L., Moen, R., Nolan, K.M., Nolan, T.W., and Norman, C.L. (2009). Provost LP. The improvement guide: A practical approach to enhancing organizational performance (2nd Edition). San Francisco: Jossey-Bass Publishers.

Part 3 Measuring Impact

Evaluation Summary

A critical component of LCs is teams deciding upon individual metrics they will collect to assess their progress in real time throughout the project. These team-based metrics are not standardized across teams; rather, they collect information they believe would be most useful to guide their own work. These individual team-based metrics were never identified by teams for this LC given other dynamics that took precedence, specifically a pivot from focusing explicitly on the TIAR Principles to broader concepts of trust, harm, and healing. Ideally, these team-based metrics would help inform whether the LC was effective. However, the evaluation that was done, coupled with a review of PDSAs tested by participants, yielded information about whether or not this initiative enabled CB to move the needle on becoming trauma-informed and anti-racist. This section summarizes these findings.

Evaluation Components and Approaches

An evaluation plan was created at the outset of the LC in an effort to determine the impact of the LC on its participants and CB as an organization. An additional purpose of thisevaluation plan was to serve as a strategy to incorporate the TIAR Principle of "Bearing Witness, Centering Voices, and Honoring Lived Experience" into CB data collection and reporting practices. An anonymous, safe space for BIPOC staff to provide feedback on their experience was a priority. Feedback from this evaluation plan will inform future LCs, taking into consideration especially voices of BIPOC who have historically been harmed by evaluation methods and are too often left out of conversations.

The evaluation plan included a mix of conventional and unconventional methods of qualitative and quantitative data collection, all in service of understanding how this process was affecting the achievement of the objectives described in the Evaluation Objectives below.

- **Pre-surveys:** Pre-surveys were conducted prior to each of the three in-person two-day Learning Sessions. Surveys included a self-assessment and gauged progress and opinions on the LC components. Self-assessment questions were static and comparable across all three pre-surveys, as well as one post-survey, whereas other elements of the survey were dynamic and mirrored happenings within the Learning Collaborative during each time period (e.g. progress on PDSAs; satisfaction with monthly meetings). Pre-surveys were exclusively conducted online via Google Forms and SurveyMonkey. Select results from each pre-survey were discussed at All-Team Meetings prior to the next Learning Session and all results were made available to participants and the LC planning team via Basecamp.

- **Post-surveys:** Post-surveys were collected after each Learning Session and at the conclusion of the LC (total of four). Post-surveys focused on collecting feedback regarding each session's activities. Learning Session 1 and 3 post-surveys were given in-person while Learning Session 2 and the final evaluation were collected online via Google Forms or SurveyMonkey. Results were made available to all participants and the LC planning team via Basecamp.

- **Mentimeter Polls:** Mentimeter polls were conducted during Learning Sessions 1 and 2. These anonymous live polls requested point-in-time feedback from participants during group discussions and displayed the anonymous answers on a screen. Feedback from these polls was used to adapt the Learning Session agendas in real time. The questions included in these polls are included in Appendix F.

- **Coach Group and Individual Interviews:** A group interview for coaches was conducted in December 2023 and included three of the seven coaches. A one-to-one interview with a fourth coach was also conducted. Coaches discussed their experiences as coaches and observations of the LC process, as well as which elements they perceived were most or least beneficial to transforming the organization. The interviews were conducted via Zoom and transcribed by Otter.ai. The conversations were summarized, anonymized, and provided to the coaches and LC planning team.

- **Participant Group Interview:** An interview with two LC participants was conducted in January 2024. This was a voluntary process in which all participants were invited to join. These two participants discussed their individual experiences in and observations of the LC. The interview was conducted via Zoom. The conversation was summarized, anonymized, and provided to interview participants and LC planning team.

PRINCIPLES IN ACTION

Cluster 1.
Bearing Witness, Centering Voices, and Honoring Lived Experience

Create and use anonymous, safe spaces for BIPOC staff to provide feedback as part of evaluation design

---

BIPOC Voice Representation

Pre-Survey 1
36% BIPOC (N=36)

Pre-Survey 2
39% BIPOC (N=28)

Pre-Survey 3
33% BIPOC (N=21)

Final Self-Assessment
40% BIPOC (N=10)

- **Storytelling:** Storytelling provides a less structured opportunity for sharing narratives and experiences and occurred throughout the LC experience. Some participants sought one-to-one debriefing sessions with the LC planning team and/or coaches, resulting in a significant portion of LC qualitative data being gleaned via candid, informal conversations. For example, after the first Learning Session, a participant reached out individually to the LC planning team to express concerns about harm. Based on this information, the next Team Lead call dived more deeply into the topic of harm. This conversation, in turn, helped shape the next Learning Session to focus on the concepts of trust, harm, and healing. Due to the informal nature of these conversations, we were unable to perform thematic or sentiment analysis; however, this approach proved to be one of the most successful methods of informing how the LC would proceed, as it provided real time personal reflections.

Evaluation Objectives

Developing short, intermediate, and long-term objectives was a critical component of the evaluation plan. These objectives and their associated indicators served as the foundation for the various evaluation activities and are indicators of the LC's effectiveness. The LC concluded approximately six months prior to the initiation of this report; thus, only short-term and intermediate objectives could be assessed. Long-term objectives are listed for reference and future evaluation planning.

SHORT-TERM OBJECTIVES

KNOWLEDGE	ATTITUDES	SKILLS	SATISFACTION / EXPERIENCE
HOW WE WILL KNOW			
Participants will show an increase in their understanding of anti-racist practices and strategies to dismantle White Supremacy Culture within the organization.	Employees will demonstrate a positive shift in attitude toward actively challenging and disrupting racist behaviors, practices, policies, and procedures within the organization.	Participants will increase their ability to identify areas for improvement from a racial justice lens and implement anti-racist policies, practices, and procedures.	Participants will report satisfaction with the Learning Collaborative experience and agree that they had the opportunity to learn from and connect with colleagues, leadership, community members, and partners who are committed to trauma-informed, anti-racist work.

Findings Related to Short-Term Objectives

Changes in the short-term objectives: knowledge, skills, attitudes, and satisfaction/experience, varied during the LC. While there are significant limitations to the data (see "Evaluation Limitations" below), the aggregate responses are outlined as follows. With the exception of the Mentimeter, PDSA, and satisfaction/experience results, comparisons were made between data from pre-Learning Session 1 and post-Learning Session 3. Please note that, due to attrition, there were 49 participants that began the LC and 42 participants at the conclusion. Not all participants at any given point in time responded to each component of the evaluation plan. The number of respondents is included in this discussion section for context.

Knowledge

- **Racism and Race-related Assumptions:** Understanding of how racism and race-related assumptions, stereotypes, and biases can impact relationships, interactions, and decision-making in client care increased from 33% (N=36) of respondents rating their knowledge as "Very Good" or "Excellent" to 70% (N=10).

- **Understanding of the NCTSN Principles** of a trauma-informed, anti-racist organization increased from 3% (N=36) of respondents rating their knowledge as "Very Good" or "Excellent" to 40% (N=10).

- **Understanding of White Supremacy Culture** and how and/or where it manifests at CB increased from 14% (N=36) of respondents rating their knowledge as "Very Good" or "Excellent" to 70% (N=10).

Attitudes

- **Importance of TIAR:** Belief that implementing trauma-informed, anti-racist policies, practices, and procedures at CB has a "Great deal of importance" or is "Completely important" increased from 94% (N=36) at the beginning of the LC to 100% (N=10) by the end of the LC.

- **Belief in Taking Action:** Attitudes surrounding the belief that respondents could take action to improve trauma-informed, anti-racist care for clients improved from 61% (N=36) of respondents "Agreeing" or "Strongly Agreeing" to 70% (N=10).

- **Belonging:** The feeling of belonging to a community at CB decreased from 78% (N=36) of respondents "Agreeing" or "Strongly Agreeing" to 70% (N=10).

- **Optimism** about CB's ability to change fluctuated throughout the LC. At the beginning, 56% (N=36) of respondents were optimistic and that number continued to increase before Learning Session 3 (71%, N=21). However, optimism decreased at the end of the Learning Collaborative, with only 40% rating themselves as optimistic (N=21).

- **Mentimeter Polls*** asked participants which conditions and behaviors were present at CB. Seventy-six percent (76%) of participants responded that **rumors and gossip** were present, 60% responded that there was a **lack of open communication**, 57% responded that there was **secrecy and hidden agendas**, and 51% responded that there was **dishonesty or reframing of the truth** to suit the needs of a few (N=37).

- In **Mentimeter Polls***, an additional seventy-six percent (76%) of participants responded that they had **experienced information being withheld**, 51% had **witnessed or directly experienced BIPOC staff being excluded** from decision-making, 43% had witnessed or directly experienced **BIPOC staff treated unfairly**, and 41% had **experienced broken confidentiality** (N=37).

Skills

- **Interrupting Racism:** The feeling of being supported in interrupting racism that they experience or observe at CB decreased from 58% (N=36) of respondents responding that they "Agree" or "Strongly Agree" with feeling supported to 50% (N=10) of respondents.

- **Testing PDSAs:** Participants on the LC teams reported testing 43 Plan-Do-Study-Act (PDSA) cycles. These included practices related to five-minute pauses between meetings, development of Zen rooms, creation of a Men of Color Support Group, and Latino Integrated rounds to improve culturally responsive services across programs serving monolingual families.

Satisfaction/Experience

- Common themes that arose during the interviews with three coaches included the **need for leadership buy-in and increased participation**; the need for additional prep for coaches, especially an organizational snapshot highlighting current challenges; and better alignment with methodology used in the LC.

- Interviews with two participants revealed similar responses, with the addition of the theme of **TIAR being more of a personal than an organizational journey**, due to lack of engagement from some teams and increased mistrust. Participants reported pride in CB's progress towards becoming trauma-informed and anti-racist despite obstacles encountered during the LC.

*The responses in these Mentimeter polls were predetermined checkbox options created and pre-loaded by the Planning Team based on discussions with participants, teams, and coaches after Learning Session 1. Participants were unable to create individual write-in responses.

INTERMEDIATE OBJECTIVES		LONG-TERM OBJECTIVES	
BEHAVIORAL	DECISION- MAKING / STRUCTURAL	CULTURE	POLICIES AND PRACTICES
HOW WE WILL KNOW		HOW WE WILL KNOW	
Participants will report taking specific actions to challenge and interrupt racist behaviors in their workplace as a result of the Learning Collaborative.	Participants will increase their ability to analyze situations through an anti-racist lens, informing their decision-making processes and assessing and addressing structural changes in the organization.	The organization will honor each individual's value and lived experience. The organization will actively support work to dismantle White Supremacy Culture and engage staff, families, community members, and partners in racial justice work.	The organization will review existing policies, practices, and procedures from a racial justice perspective and revise or implement new ones, engaging staff, families, community members and partners in the process.

Findings Related to Intermediate Objectives

Any organization hoping to begin an effort to become trauma-informed and anti-racist must prepare to face many challenges and recognize, focus, and celebrate small wins. A vital part of the process, and one of the reasons this undertaking is so challenging, is that individuals must assess their belief systems and values, which have been deeply ingrained to the point that many are unaware of their own biases. Throughout this process, people are not only asked to evaluate their values, but also begin to make shifts that align with a trauma-informed, anti-racist lens they may not be prepared to adopt. As the individuals who comprise the organization make changes to their core belief systems, and begin to identify where they fit in the spectrum of structural and systemic racism, shifts begin to happen – some small and some broader. As noted above, the evaluation attempted to look at these shifts in the broad categories of behavioral changes and decision-making /structural changes.

Behavioral Changes

- **Naming Elements of WSC:** In addition to testing PDSAs, staff shared with their VPs an increased comfort in naming elements of White Supremacy Culture (e.g. perfectionism) as they arise at work, and taking the opportunity to discuss effects on individuals, teams, and the organization. They further reported opened-up spaces to discuss mistakes as opportunities for learning, in order to begin to shift organizational culture. There was a slow movement from a fear zone (avoid hard questions, strive to be comfortable, talk to others who look and think like me) to a learning zone (vulnerable about my own biases and knowledge gaps, understand my own privilege, seek out questions that make me uncomfortable). However, as conversations became too challenging, some staff went back to the fear zone, creating ruptures and mistrust. The frame used for these zone concepts is included in Appendix G.

- **Calling Out Actions:** Staff further shared (in the development of the BIPOC Strategies - see below) increased willingness to call out actions that do not align with TIAR Principles, especially related to bearing witness, centering voices, and honoring lived experience. For example, staff began to question who is at the table, who is making decisions, whose voices are heard, and how other voices need to be lifted. One participant noted that while it was important for "higher-ups" to be in the room and hear what other staff had to say, their ability to respond may be harmful to staff of color, especially if they are not ready to include these newly lifted voices. As power redistribution has largely not taken place, these newly invited voices may experience microaggressions if their voices are not genuinely invited or welcome.

- **Sense of Urgency:** An identified organizational culture shift occurred related to the sense of urgency and "being busy" all the time with no time for self-care during the work day. One PDSA tested implementation of a five-minute grace

period between meetings. Some staff began to schedule meetings to include a five-minute break in between meetings, while others scheduled meetings on the hour but provided five minutes for transition. This was well received by staff and others began to incorporate this small but important change. Also, as staff reviewed the content of the meeting, they thought of different ways to share power and be more inclusive in the development of their agendas.

Decision-Making and Structural Changes

- **BIPOC Strategies:** During Learning Session 2, BIPOC staff met as an identity-based affinity group and developed a list of "BIPOC Strategies" (as they were termed following the meeting) that centered the voices and experiences of the staff of color at CB. Not only were some of these strategies tested by teams, but the prioritization of these strategies at the final in-person Learning Session formed the basis for the post-LC internal working groups. Under the Organizational Values, Governance, and Strategic Oversight cluster of the Principles, the BIPOC group came up with three strategies: 1) identify WSC and internalized superiority, 2) create a BIPOC specific space, and 3) for white leaders to prepare for and do the work. Under the Structural Reforms, Partnerships, and Systems Change cluster, the BIPOC group identified the need to incorporate restorative practices as a way to co-create multicultural spaces. CB formalized a training protocol where staff participate in different types of circles (Narrative Based Agreements, Community-Building, Problem Solving, and Harm Circles) to help build community, develop connections, and co-create community norms that address the personal and cultural needs of everyone participating in the circle.

- **Breaking Down Silos:** An unplanned outcome of the LC was the opportunity for staff from different programs and sites to meet one another, begin to form relationships, and share information. A major issue identified in the organization was the silos and the lack of opportunity for staff to interact. In an effort to begin to create more inclusive opportunities, one team decided to invite staff outside of their department to their staff retreats. This team has access to additional funding for activities that other teams can't access. By inviting others to these activities, the team began to acknowledge systemic inequities within the organization and decided to share their resources.

- **Identity-Based Groups:** Two structural changes made as a result of the LC were the establishment of the **Latinos/ Hispanos en Acción** monthly meeting and the **Men of Color Support Group**. These two groups were formed to meet needs in the organization and proactively center voices and support BIPOC. The bilingual (Spanish-speaking) providers identified the need to provide a space of support and learning with peers regardless of positions in the organization. This meeting is conducted in Spanish, addressing language justice as well, given that most supervisors are not Spanish speaking and providers often have to interpret their interactions from Spanish into English. This team is also discussing issues related to decolonizing mental health by understanding assimilation and its effects of the service delivery to their own communities. In addition, the Men of Color Support Group was created to support and cultivate leaders while working on retention of men of color at all levels of the organization, addressing both honoring lived experience as well as prioritizing the development, promotion, and retention of people who are Black at all levels of the organization.

- **Organizational Newsletter:** In order to minimize silos, one team worked on developing a newsletter to increase communication and transparency, addressing some of the critical issues raised in the BIPOC list. Staff expressed appreciation for this newsletter as supervisors from each department contributed to the newsletter, sharing staff milestones, accomplishments, and training opportunities, thus connecting departments and individuals within the organization.

- **Team-Building /Community-Building:** Several teams also worked on team-building activities with the purpose of creating and building a community. The monthly VP, Directors, and Managers meetings continued to be scheduled after the LC ended and served as another way to break down silos and build community. An ice breaker is used at each of these meetings as a way to slow down, see staff as individuals, create connection, and build community. Other teams implemented monthly lunch get togethers where they used the time to connect and learn about each other's culture.

- **Zen Room:** Lastly, a very well received change was what a team chose to call the "zen room." Staff, especially BIPOC staff, reported high levels of stress at work and, in response, this team created a spa-like space of healing that could be accessed by anyone at any time of need. This idea emerged from the BIPOC list and was in turn adopted by other sites and supported by the HR and Facilities departments. A zen room is scheduled to be identified at each CB site to make this opportunity accessible to all employees regardless of location. Although it is open to all CB staff, anecdotally it seems to have a significant impact on BIPOC staff specifically.

Findings Related to Long-Term Objectives

As mentioned above, any organization striving to become trauma-informed and anti-racist understands that organizational change is incremental and can take many years. Employees need time to assess their belief systems and values, making it a gradual process to get both leadership and staff to recognize how WSC is embedded in the organization (deconstruction) and to begin implementing changes (reconstruction) to become trauma-informed and antiracist.

Evaluation Limitations

There are several limitations to the data collected during the LC that led to the results being descriptive, rather than inferential. However, sharing all results of the pre- and post-surveys is critical to becoming trauma-informed and anti-racist. Those who generously participated in the evaluation process deserve to have their opinions, experiences, and voices acknowledged and represented, and we have a responsibility to be transparent. Rather than exclude imperfect data, we chose to include it so that we can align with one of the Principles at the core of this work: **Honoring Voices**.

The first of these limitations is the **small sample sizes,** which decreased over the ten months, as shown below. At the lowest, the final post self-assessment responses represented only 27% of the 42 total participants who were in the LC at that point in time due to attrition.

Learning Collaborative Evaluation Sample Sizes

Survey Name	Time Frame	Mode	N
TIAR LC Learning Session 1 Pre Survey	Pre LS 1	Online - Google Forms	34
TIAR LC Learning Session 1 Post Evaluation	Post LS 1	Paper	36
TIAR LC Learning Session 2 Pre Survey	Pre LS 2	Online - Google Forms	28
TIAR LC Learning Session 2 Post Evaluation	Post LS 2	Online - Google Forms	16
TIAR LC Learning Session 3 Pre Survey	Pre LS 3	Online - SurveyMonkey	21
TIAR LC Learning Session 3 Post Evaluation	Post LS 3	Paper	28
TIAR LC Post Self-Assessment	Post LS 3	Online - SurveyMonkey	10

Another limitation was the **lack of paired data** across the three pre-surveys and the post self-assessment. In total, only nine participants had paired data across the three pre-surveys including self-assessments, and only two participants had paired data across all four self-assessments. This, combined with the lack of representation in the sample sizes, prevented us from being able to measure progress towards meeting short-term objectives and any organizational impacts of the LC.

One cause for both of these limitations may have been the surveying modes. Participants were more likely to respond to in-person paper evaluations or anonymous Mentimeter polls; however, because of the hybrid nature of the LC, it was not feasible to collect all surveys in-person. Requiring participants to recall their Unique Identification Numbers to track surveys also proved to be a challenge. The process of making participants responsible for creating, storing, and recalling their Unique Identification Number was developed to maintain anonymity; however, this failed.

A second potential cause for these limitations was an overwhelming distrust of how data would be used, as well as the fear of retaliation, as raised by some participants in Co-Creating Community training and through other anecdotal reports.

These concerns prevented many participants from engaging in the evaluation process. This became evident after conducting the Learning Session 2 post-survey, in which the response rate dropped to 43%. To build trust and confidence within the group, the Program Evaluator joined several All-Team Meetings to explain collection methods, data security, and present findings. Despite this, sample sizes continued to dwindle.

Distrust and wariness of sharing opinions also became a challenge for conducting group and individual interviews. Willingness to participate in a focus group was polled in the post self-assessment survey. Fifty-percent (50%) of respondents said they would be interested in participating, while 30% said they might be interested but would need more information, and 20% said they would not be interested (N=10). Ultimately, only two participants agreed to participate in a group interview. Due to the sample size, information obtained during the conversation is shared above; however, it cannot be generalized to the Learning Collaborative as a whole.

Recommendations for Data Collection

- **Team-Defined Metrics:** In order for teams to collect and track their own indicators of progress (metrics) throughout the process, they must have protected time, support, and guidance to do so early in the process.

- **Protected Staff Time:** Staff participation in data reporting also takes time, which must be acknowledged and built into work plans. Otherwise, once "the process" starts, they'll be too busy with all of the other work that it becomes challenging to shift and make it a priority.

- **Data Collection in the Moment**: Collecting data in real time was more successful than doing so after the fact. Promising strategies include surveying participants in-person, live polling, and creating space for, and ways to collect, storytelling with trusted partners. Additionally, creating best practices that ensure anonymity and result in transparency can be key to building trust with participants and reassuring that their opinions and experiences are heard, valued, and safe from retaliation. Participants continued to be concerned about how harm might be further perpetuated if they engaged in honest or vulnerable conversations, which elucidates just how necessary trauma-informed, anti-racist practices continue to be, including in evaluation methods.

- **Third-Party Surveys and Evaluator:** Outsourcing surveys to a third-party consultant or company is a possible solution to low response rates due to fear of retaliation and lack of trust. Although many precautions were put in place to protect participant identity, the responses were still received internally by the Program Evaluator. Utilizing a third party who is not connected to the organization and can provide aggregate, de-identified survey results may promote increased survey engagement.

Part 4 Lessons Learned

Lessons learned through the CB Learning Collaborative may assist other organizations striving to become trauma-informed and anti-racist. This section contains a discussion of each lesson before moving into promising approaches and tools. An overarching lesson is that a traditional Learning Collaborative, as led by NCTSN sites since 2005, is not sufficient to facilitate the type of transformation called for in anti-racist work. Further, any efforts that are put into place to promote TIAR work, including project and agenda design, defining outcomes, data collection, content delivery, project structure, project leadership, and facilitation must be done in intentionally anti-racist ways. Five key additional lessons emerged from this work.

Key Lessons from this Effort

1 Assessment of organizational readiness and capacity to undertake a Learning Collaborative increases the likelihood of progress toward becoming trauma-informed and anti-racist.

2 Overlaying a Learning Collaborative with a training series enables the establishment of shared language and knowledge along with the opportunity to translate that knowledge into action.

3 Participants and teams that honor the expertise held at all levels of the organization, and engage in the process directly, enable roles, responsibilities, and decision-making in the LC to be transparent and diffuse.

4 Positional leaders must embrace learning and humility as they strive to embody anti-racist leadership and authentically share power.

5 Significant unmet organizational development needs not specifically tied to anti-racist efforts can negatively impact the effectiveness of the LC process.

> A traditional Learning Collaborative, as led by NCTSN sites since 2005, is not sufficient to facilitate the type of transformation called for in anti-racist work. Further, any efforts that are put into place to promote TIAR work, including project and agenda design, defining outcomes, data collection, content delivery, project structure, project leadership, and facilitation must be done in intentionally anti-racist ways.

1 **Assessment of organizational readiness and capacity to undertake a Learning Collaborative increases the likelihood of progress toward becoming trauma-informed and anti-racist.**

Before embarking on the process of becoming a trauma-informed, anti-racist organization, it is imperative to determine if the organization has the capacity and willingness to change. Capacity includes timing (e.g. what else is going on organizationally), resources (e.g. making productivity adjustments, funding the initiative) and staff competency and skills. Willingness is a bit trickier to determine, but no less important to intentionally gauge.

Every organization is composed of individuals at different places along a continuum. At one end are staff who will not see the need for or importance of anti-racism work and at the other end are individuals already fully committed to the change effort and engaged in individual work. One of the challenges in anti-racism work is to design an initiative that "meets people where they are," but doesn't require those who are more advanced to slow down and wait until others catch up. Regarding willingness from an organizational perspective, it is not necessary to gain buy-in from every person in the agency prior to starting the initiative. However, it is necessary to have "enough" buy-in, coupled with the expectation that more staff will come along. It is also important to note that anti-racism initiatives can lead to shifts in staffing. This work can be the impetus for some staff to resign from the organization - some because they feel the work is threatening, unnecessary, or dissonant with their own beliefs, and others because they feel the work is moving too slowly, is inauthentic, or even harmful.

> **Timing.** Is this the right time in the organization's life to embark on a journey to become anti-racist? Are there other things going on that would further complicate an already complex and complicated process? As noted at the end of Section 2 in "Organizational Changes," the organizational split occurring at CB in tandem with the LC was complex, confusing and conflictual, and sometimes experienced as antithetical to anti-racist principles. In addition, at times the anti-racism work became derailed due to the need to focus on more basic organizational development in an effort to manage that change. In retrospect it may have been more effective to allow the organizational structure to settle before undertaking the LC. (See lesson 5 in this section for more on this issue.)

Resources. Anti-racist work needs to have dedicated and protected time for staff to fully engage. Not having time to do the "extra" work of anti-racism was something heard again and again from LC participants. However, when this issue was raised by a white staff member at a Learning Session, it led to some strong negative reactions from BIPOC staff who expressed not having a choice about finding time to do this work as they are forced to experience it everyday as part of their daily lives. In addition, funds must be secured to cover not just staff time and productivity but internal leadership, internal or external facilitators, evaluator, external coaches, and materials, among other expenses.

Staff competencies. It is important to determine the staff competencies that are needed in the areas of communication, managing conflict, knowledge and understanding of racism, oppression, WSC, and courageous conversations. While training that occurred before and during the LC helped staff develop these competencies, a major learning was related to the sequencing, with many indicating the Co-Creating Community/Restorative Practice training provided at the end of the LC should have occurred before the LC started to ensure that staff had skills and practice in healing when harm occurred. Assessments of where staff are in the Fear/Growth Zone and Anti-Racist Organizational Continuum may also be useful (see Appendix G and Appendix H) for getting a baseline on where staff competencies lie.

Start with dismantling and deconstructing. In *Deconstructing racism: a path toward lasting change*[7], Major and Barndt make the case that, in order for transformational change to occur, one must dismantle the foundation of racism by getting at the faulty assumptions that underlie racism. This is akin to rocking an organization to its core. They assert that racism's roots are a function of race-based identity, race-based history, and race-based culture. All three have to be dismantled BEFORE implementing anti-racism strategies in the process of reconstruction. The three reconstruction strategies are developing and implementing an anti-racist mission, a process for anti-racist decision-making, and a practice of anti-racist accountability. While this LC dove right into the first set of TIAR Principles and strategies, it soon became apparent that major trust issues and past harm needed to be addressed and healing achieved (deconstruction) before the work of anti-racism could take place (reconstruction).

Trust, harm, and healing. These themes emerged between Learning Sessions 1 and 2 as part of the deconstruction process. They were there all the time, just under the surface and rarely spoken. Although these were identified as critical themes prior to the Learning Session, Day 1 uplifted them even more explicitly, resulting in dramatic changes to the agenda on Day 2. The evaluations of that Learning Session indicated that this pivot was helpful and important to participants. Indeed, 69% (N=16) of participants agreed that mixed group discussions on trust, harm, and healing on day 1 provided them with an opportunity to reflect on foundational issues and practice having conversations with others in CB from different race and identity groups. In addition, 93% (N=16) of participants agreed that the discussion of trust, organizational culture, and the specific impact on BIPOC staff using anonymous Mentimeter voting on day 2 allowed the teams to identify issues that needed to be addressed at CB. Overall, it became clear that skill building, community-building, and trust building are foundational preparation for anti-racism work.

② **Overlaying a Learning Collaborative with a training series enables the establishment of shared language and knowledge along with the opportunity to translate that knowledge into action.**

Becoming a trauma-informed, anti-racist organization involves addressing systemic and structural issues in addition to individual and interpersonal dynamics. Movement in the right direction is both a complicated and complex process that requires change at all levels of the organization. Deciding on what methodology(ies) to utilize in efforts to reach this goal is a critical decision point that should be made with intention before embarking on the journey. In this project, a decision was made to employ a series of trainings [list of trainings noted earlier in this document] as well as use a Learning Collaborative approach. Training took place before and during the LC and included a variety of CB staff (some included all staff; others were voluntary).

LCs and training workshops have significant differences and were viewed as complementary in this effort. Training is primarily about knowledge, skill and attitude development at a single point in time. However, one-time training workshops typically lack the type of reinforcement needed for retention and application. LCs occur over a period of time and are focused on implementation, i.e., translating what we know into what we do. After taking action, there is an opportunity for feedback and shared learning among those participating. This type of methodology optimizes the likelihood of improvements and implementing sustainable changes.

7. Major, B.C., and Barndt, J. (2023). Deconstructing racism: A path toward lasting change. Minneapolis, MN: Fortress Press.

In terms of the training components, these were essential as the LC itself did not offer specific knowledge-based training. In particular, **Undoing Racism**, which was provided to nearly all CB staff (92%, N=241), served as the foundation for the work of the entire LC with its core premises related to racism, power analysis, privilege, fragility, deconstruction, and community organizing. Rather than introducing these concepts for the first time as part of the LC, participants entered with common language and common teachings related to the fundamental beliefs.

The sequencing of training provided also seemed incredibly important. **Co-Creating Community (CCC)**, a practice to promote trust, develop skills related to challenging conversations, and provide opportunities to address harm and healing, was introduced late in the LC process. Many staff and coaches reflected that this would have been helpful prior to the LC as additional preparation. In evaluating the Co-Creating Community training specifically, 85% (N=20) said that CCC was A Great Deal or Completely beneficial to their experience and/or contributed to the work they've done in the Learning Collaborative so far. Seventy-five percent (75%, N=20) said that CCC was A Great Deal or Completely beneficial to understanding how important it is to co-create spaces and use restorative practices.

In addition, it is important to note that the **LC methodology** has most frequently been used for change efforts across multiple organizations, rather than within a single organization as this one was. In the more typical construct, participating teams are often a subset of staff members and partners who are already internal champions of the work. They begin testing PDSAs in a focused area with the expectation of spreading and scaling up their work across their full organization over time. This LC, however, was constructed to affect broad and deep change simultaneously by comprising teams that were based on various programs across CB. Having a broad cross-section of staff involved in this effort feels essential to anti-racist work.

Further, LCs are typically used with narrowly focused topics in behavioral health with an emphasis on implementation, rather than on the types of complex, relational, transformational issues that needed to be addressed for trauma-informed, anti-racist practice. While the LC approach has been done effectively in a single large child welfare agency (3000 staff with 29 unique offices), it was not focused on anti-racism; it was focused on a specific and concrete issue in child welfare (adolescent permanency).[8]

In planning to do this work, it is critical to identify methodologies and approaches that the initiative will utilize, while honoring the complex and developmental nature of anti-racism efforts and being ready to pivot as needed. In this initiative, we believe the willingness to employ strategies and processes that didn't fit neatly into training or Learning Collaborative paradigms added to the complexity, but overall enhanced the work. (See Identity-Based groups discussion in the Promising Approaches section).

3   Participants and teams that honor the expertise held at all levels of the organization, and engage in the process directly, enable roles, responsibilities, and decision-making in the LC to be transparent and diffuse.

In addition to understanding if the organization is "ready" to engage in a LC process, understanding what it looks like to bring together staff and participants is equally critical. Like all organizational change efforts, LCs require work as teams, not simply individuals. And as described as a key element of LCs, the composition of teams should honor the expertise that is held at all levels of an organization as well as amplify the essential perspectives of those closest to the work with clients.

The Equitable Implementation Guide, developed by the UNC School of Social Work's Collaborative for Implementation Practice (2023) describes the need to "shed the solo leader model of implementation" as part of dismantling power structures.[9] This requires a diverse team-based approach where roles, responsibilities, and decision-making is transparent and diffuse. As described earlier, the initial team construct for the LC at CB was to invite all staff across the organization who wanted to participate to comprise voluntary teams from within their own programs or divisions. This approach aimed to allow staff who worked closest together to do the deconstructing and reconstructing work in ways that were most meaningful to them. It also seemed important for staff who work together to travel the anti-racist path together in order for the work to ultimately be sustained.

8. New England Association of Child Welfare Commissioners and Directors. (2007). Common Ground for Professionals, Advocates, and Families, 22(2).

9. Collaborative for Implementation Practice. (2023). Equitable implementation guide. Chapel Hill, NC: UNC School of Social Work. https://implementationpractice.org/resources/equitable-implementation-guide/

Despite seeking volunteers to participate, some participants still felt as if they were mandated to be there by their supervisors. And many of the teams were **supervisor/manager heavy**, with few staff representing direct care or front-line work. Two participants said they wished there had been more staff who were "closer" to the work itself. Too many people from "higher up" were given a platform and, as a result, the work didn't get to the ground level.

Participating in a Learning Collaborative requires not only commitment and passion, but also time. Participants are expected to meet regularly with their own team, as well as join LC all-participant calls, in-person Learning Sessions, and, most importantly, test changes and serve as champions of the work in their everyday roles. It is a heavy lift that needs to be recognized in some way by the organization to facilitate and support meaningful participation.

A significant challenge at CB was that line staff don't have as much **flexibility** as managers and directors to participate in special projects like the LC. Further, as noted above, participants were not given dedicated time by the organization to participate in this effort; thus participation implicitly favored those staff without productivity requirements or those teams that were not already understaffed or spread too thin.

Another challenge for team constructs was rooted in **communication**. While the initial goal was to spread the message about LC participation in a waterfall approach that allowed managers and supervisors to lead their own staff members, it became clear that messaging directly with participants would have limited diffusion of the message. Multiple types of communication – repeated many ways in different forms – are also important as people hear things differently depending on how it is presented to them, including who the messenger is.

Because a Learning Collaborative is an initiative unlike a more traditional training approach, participants and coaches need **time to be oriented** to the methodology, process, logistics, and expectations. Specifically, providing ample time and guidance to adequately **prepare the coaches** for their multifaceted role is important so they can bring their expertise into the work. This could include a kick-off orientation specific to coaches, an organizational snapshot, LC concepts and vocabulary, clear orientation to the LC process, and a defined plan for their engagement with teams and participants.

These orientations are similar to the need for foundational learning as discussed above, but specific to engaging in work in a new way that involves being part of a shared learning community, working with coaches, using the TIAR Principles as anchors, and testing changes in practice and process. Because of the organizational culture at CB, more orientation was also needed to reinforce why it was essential to **flatten hierarchies** and move away from a culture in which permission was needed to make changes.

4 **Positional leaders must embrace learning and humility as they strive to embody anti-racist leadership and authentically share power.**

The role of leadership is critical for any organizational change effort and CB's ongoing journey to becoming a trauma-informed, anti-racist organization is no exception. Leaders who take on responsibility and accountability for this work should include those with the requisite title/position/role as well as those without formal authority who nonetheless wield influence within the organization. Analyzing and understanding the power dynamics within formal and informal leadership is a necessary component.

Furthermore, when those in positions of formal leadership hold onto power, it can have significant implications for limiting anti-racist work. Those with power have the ability and potential to gate-keep, limit, undermine, or completely prevent real anti-racist work from happening.

Anti-Racist Leadership is an emerging concept. We suggest that this type of leadership is representative of the skill set necessary to lead transformation efforts in this arena. There are quite a few books, institutes/programs (some lasting days, weeks and as long as 12 months), podcasts, videos, and articles/blogs devoted to this topic, but there is no single agreed upon clear-cut single definition of what anti-racist leadership is. Many of the resources available are geared toward educational settings, with a few aimed at corporate environments. Several sources conflate anti-racist leadership with DEIB leadership. While DEIB and anti-racism initiatives are related, they are not the same; consequently, there are vast differences in the

> **This leadership can be held by an individual or it can be diffused across multiple people, but the understanding of the combination of leadership and power is critical for anti-racist work.**

leadership needed to guide each of them. Another approach to description equates anti-racist leadership with other desired leadership types (e.g. Inclusive, Humanistic). In *Anti-Racist Leadership: Why it Matters and How to Become One*, Dr. Nicole Evans, writes that "Anti-racism leadership requires deep reflection, establishing an anti-racist mindset, modeling anti-racist practices and embedding anti-racism structures throughout the organization."[10] She asserts that by engaging in these practices leaders help establish the opportunity for dismantling racism at the individual, interpersonal and institutional levels which are the elements needed for transformational change.

In an effort to understand the lessons learned in this area, CB's hierarchical structure is important to understand in framing this work. There are leaders at the following levels: C-suite, Vice President, Director, Manager and collectively, this group believed in the importance of and were committed to trauma-informed, anti-racist change in varying degrees. Perspectives ranged from those who were deeply committed to racial justice to those who "didn't see color." In addition to this established hierarchy, a position was created to facilitate the initiative (and funded by the SAMHSA grant), Vice President of Anti-Racist Practice, whose sole purpose was to facilitate the design, implementation, and sustainability of the anti-racism efforts across the organization.

While having a person dedicated to this role prevented organizational drift from the goal, there were times when having an individual leader whose primary job function was to focus on anti-racism made it hard to balance individual and group responsibility/accountability for the work. One solution to this challenge would have been to task a **designated anti-racism team** with the primary responsibility for organizing, facilitating and tracking this change process under the leadership of the VP This is not to suggest that anti-racism work should be siloed to just a few individuals or teams in the organization. Figuring out who (and how many) you need buy-in from, what roles they should play and at what point in the process increases the likelihood of positive movement. Individuals are needed from every part of the organization and at every level. This includes balancing the mix of individuals with and without leadership titles as described in the section above. It is also critical that the work is clearly endorsed and actively supported by those in positional leadership roles.

While it is not uncommon for non-leadership staff to be critical of leadership staff as part of organizational culture, this was an ongoing phenomenon noted throughout much of the LC portion of the anti-racism initiative. An often heard refrain was "leadership needs to get its act together." It is important to note that there were actually two separate leadership groups engaged in the LC - one from Health Partners and the other from Community Care Center. Critically important was that both leadership groups heard the concerns and agreed to meet as a single group on a regular basis. The meetings were facilitated by member(s) of the coach team and attendees included those in the organization who were at the ED, VP and C-suite levels from both HP and CCC. **Restorative practices** were used as a mechanism to create an overall sense of community across the joint leadership team with specific goals of enhancing communication and working more effectively as a team. Recognizing the critical nature, this leadership level work was still developing, with plans to continue, as the LC came to a close.

It is also important for organizations to be prepared for the possibility of **predictable leadership response patterns** when engaging in anti-racism work. These include (but are not limited to): new leaders emerging in the organization and seeing themselves in new roles; mid-level leaders with some experience, feeling empowered to center/amplify their voices in ways the power structure in the organization is not used to; as well as established, long time leaders feeling threatened by/ resistant to the emerging shift in culture and retaliating against those championing the change. How well organizations acknowledge and deal with these in intentional ways will have an impact on who goes and who stays. All three of these scenarios occurred during this initiative at CB, and in each case, individuals left the organization. It is important to note that neither negative or positive valence is being attached to staff departures, but as noted, staff departures for a continuum of reasons are to be expected when engaging in organizational-level anti-racist work.

Lastly, related to leadership is the relationship between **racism and power**. The exact nature of this relationship (both in terms of having it or not having it) has been explored, discussed and written about from many different angles. One dynamic that showed up in this effort was participants expressing that they felt powerless to make suggested changes. In theory, the LC methodology is supposed to minimize this dynamic, but it didn't in this current initiative due to deep seated organizational culture that deferred to hierarchy. This was coupled with a fear of "getting in trouble" for speaking up.

10. Evans, N. (2024). Anti-Racist Leadership: Why It Matters and How to Become One. Embracing Equity.
https://www.embracingequity.org/post/anti-racist-leadership-why-it-matters-and-how-to-become-one

5 **Significant unmet organizational development needs not specifically tied to anti-racist efforts can negatively impact the effectiveness of the LC process.**

As noted above, although organizational change is constant in all organizations, the scale and scope of continuous organizational development activity at CB had a negative impact on CB's anti-racism efforts. Because the dramatic organizational changes that CB was experiencing were simultaneous to this LC and the anti-racism work, at times it was difficult to disentangle the issues and they were sometimes conflated. What was initially identified as an issue related to racism was often unpacked as a more classic organizational development issue.

Part of shifting organizational culture in anti-racism work requires the organization to **embody the very anti-racist principles it is striving to implement in its different programs and lines of work**, in this case the Principles in Cluster 2. Organizational Values, Governance, & Strategic Oversight, as these principles attend specifically to the ways in which power, decision-making, and structures are organized within organizations. When there is dissonance between the organization's actions and anti-racist principles, it serves to undermine the culture as well as staff's belief in the authenticity of the effort overall. Embodying anti-racist principles at all levels and within all programs and processes in the organizational is critical.

An important example is when, during the course of this work, CB was in the process of bringing other community organizations under the "CB umbrella." CB described these efforts as collaborative ventures that were desired – and sometimes pursued – by the community organizations themselves as ways to help them maintain their solvency and continue providing community services. However some community members and staff perceived these ventures as some version of either white saviorism or corporate takeovers. This is a classic example of intention not matching the impact, and it is critical that organizations recognize that the perception of staff and the community is their reality and must be honored as such, especially when these perspectives are expressed by BIPOC staff and community members. The voices of those most impacted should be used to determine what partnerships and collaborations look like.

Organizations that historically rely on strong and established hierarchies also need to pay particular attention to deconstruction and shifting power. Moreover, some organizational decisions were made in ways that did not feel inclusive or transparent to staff, were driven by a sense of urgency, and were held closely by those in roles of positional authority. This was experienced by many staff as antithetical to the anti-racism effort. Deconstruction and reconstruction work needs to be done at an organizational level in bold, transparent, and explicit ways at the beginning and continuously throughout the time that training workshops and LC-type efforts are happening. The things that need to be deconstructed are centuries old and need to be paid attention to continuously. Without this deconstruction, staff simply begin to identify and name these areas of dissonance, disrupting trust and causing additional harm. Attempting to do meaningful anti-racist deconstruction and reconstruction work, in the midst of unrelated and sometimes dissonant organizational development work, may not be possible.

Part 5 Promising Approaches

Through reflection, participant evaluations, and experience with past LCs and anti-racist work, a number of promising approaches have been identified from this experience that other organizations may consider. These approaches may be used to support transformation toward becoming a trauma-informed, anti-racist organization with the acknowledgement that they are not intended to be standalone, once-and-done approaches. Each approach shared in this section is prefaced with important context and cautions as well as possible activities or tools that may support the approach. While some of these approaches are often used in some way in LCs, all of them need tailoring for anti-racist work. In addition, one approach (identity-based groups) is not typically used in LCs but felt critical for this anti-racist work. We believe the approaches described below facilitated the implementation of some of the NCTSN Anti-Racist, Trauma-Informed Principles at CB.

Promising Approaches from this Effort

1   Use the NCTSN Anti-Racist, Trauma-Informed Principles as the Collaborative Change Framework

2   Demonstrate Flexibility and Responsiveness

3   Facilitate a Relationally-Based, Trusting Shared Learning Environment

4   Create and Facilitate Race-Based Identity Groups (also called "Racial Affinity Groups")

5   Provide Opportunities for Regular Check-ins and Supportive Accountability

6   Create Opportunities to Conduct PDSAs (Small Tests of Change)

1 Use the NCTSN Anti-Racist, Tauma-Informed Principles as the Collaborative Change Framework

As described above, all LCs have a Collaborative Change Framework (CCF) as the anchor. This CCF becomes the touchstone for all work done by participants over the course of the LC. While not prescriptive, it creates common language and a clearly defined mission, set of values, and language. Participants in this LC not only read and reviewed the TIAR Principles prior to the first in-person Learning Session, but they also completed a brief self-assessment on each of the four Principle clusters during the Learning Sessions as a team activity. After completing their self-assessments, they had the opportunity to participate in small, mixed team breakout groups to identify potential strategies they might test in that Principle cluster, using the strategies included in the Principles document as a starting place. As described later, the strategies identified by the BIPOC affinity group at Learning Session 2 mapped explicitly to those in the Principles document, further reinforcing their value.

What are good ways to use the Principles?

Conduct your own **self-assessment** based on the NCTSN Principles.

Make the Principles more **concrete and meaningful** for your own setting and context.

Use **breakout sessions** to brainstorm strategies, using the strategies in the Principles document as a starting point. This helps participants make meaning of the concepts by considering strategies they could test in their own local context.

Find opportunities to **continuously return to the Principles** in intentional and explicit ways.

② Demonstrate Flexibility and Responsiveness

Another key feature of Learning Collaboratives is that while they all have specific core elements and structures, they are not rigid or formulaic. Each LC, even on the same topic, looks incredibly different as the agendas, processes, and content are tailored in real time to the needs of the participants and teams. Learning Session agendas from this LC are included in Appendix I for illustrative purposes only, with the intention of providing examples of how this work was done in this specific LC. However, organizations interested in leading their own TIAR LC should recognize that the development and design of the agendas need to be highly sensitive to context, teams, and participants (created in anti-racist ways, as noted previously).

This flexibility, responsiveness, and opportunity for open communication was demonstrated to participants from the outset of the LC. For example, the initial pre-work assignment was shifted based on a question asked on the first all-team call by one of the participants. This was followed by a participant who had not been able to attend the first Learning Session expressing a concern on a subsequent all-team call about the sole focus of the LC on anti-Black racism. Rather than simply refer participants back to the Principles document, where this issue is explained in detail, the TIAR planning team and coaches suggested creating a Latina/e affinity group to focus on this group's unique experiences with racism and at CB. This provided various types of communication and dialogue to elevate the fact that just because the Principles focus explicitly on anti-Black racism does not mean that other historically and currently marginalized and oppressed groups are not seen, heard, and valued in these transformation efforts.

This flexibility and responsiveness were carried through each Learning Session as Day 2 agendas were always adjusted based on the participants' feedback from Day 1. At Learning Session 2, the initial plan was to focus on Principle Clusters 2 and 3. Based on some of the Day 1 discussion along with the Day 1 evaluations from participants, the planning team and coaches developed a brief Mentimeter poll designed to allow participants anonymity and transparency in their responses. The following questions were posed to participants to begin Day 2:

- Which of these conditions are present at Clifford Beers?

- Which of these behaviors have you experienced at Clifford Beers?

Based on the results of this Mentimeter, which were displayed transparently onscreen during the Learning Session itself, and the subsequent conversation, the remainder of the day was recrafted entirely to allow race-based identity groups (one BIPOC and one white) to identify concrete strategies to address trust, harm, and healing. These strategies fundamentally shifted the rest of the LC, as the "BIPOC Strategies" (or "BIPOC List" as they were termed following the meeting) centered the voices and experiences of the staff of color at CB. Not only were some of these strategies tested by teams, but the prioritization of these strategies at the final in-person Learning Session formed the basis for the post-LC internal working groups.

What are strategies that promote being responsive and flexible to participants?

Create **open-ended Day 1 surveys** and review the responses in order to adjust the Day 2 agenda if/as needed. For this LC, this demonstrated a high-level of responsiveness and built trust with participants that the staff and coaches were listening to them.

Use **anonymous, transparent polls**, e.g. Mentimeter poll in real time to ask critical questions about trust, harm, and healing in a large group. Honor everyone's responses and provide opportunities to discuss the responses openly. The responses to these questions at Learning Session 2 were profound and fundamentally shifted the course of the entire LC as a result.

Center, uplift, and hear BIPOC voices and experiences in clear and intentional ways at Learning Sessions, on calls, and through the centering of BIPOC work, e.g. BIPOC Strategies.

③ Facilitate a Relationally-Based, Trusting Shared Learning Environment

Anti-racist work within an organization requires trust, and trust requires being in relationships. Thus, the shared learning environment that is core for a LC not only promotes shared learning, shared language, and peer accountability, but it also helps develop and support trusting relationships across participants who might otherwise not have the opportunity to work together. The evaluations following each Learning Session consistently indicated that the time participants had to be together and engage in this work in dedicated, in-person, protected ways was critical. In open-ended responses, participants noted the value of the shared learning construct and often asked for more time to spend across teams. For example, nearly half of Learning Session 1 participants indicated that being in-person and/or creating connections with their fellow participants was the best part of the session. One participant shared that "being in person was the difference in processing the information," while another commented "the best part was meeting everyone in person and learning and sharing with coworkers in different positions within the agency."

Doing trauma-informed, anti-racist work requires more than holding in-person meetings. Centering relationships and building trust must be central. The content of the meetings is never more important than how the content is delivered; beginning with an initial reflective activity asking participants to share their why for this work. Participants were also asked to share who they were, rather than focusing on what they did. Learning Session activities were led in ways that deepened connections based on shared humanity, rather than just roles at CB or job responsibilities. The Learning Sessions also intentionally brought in dance, music, meditation, and spiritually-focused activities that were seen as core to, rather than instead of, "the work."

Regular calls also provided an opportunity for participants to stay in relationship between the in-person Learning Sessions. Even though they were all staff at the same organization, they often were siloed in their day-to-day work and did not have many options for connecting outside of the formal LC structures. In fact, it was one of the monthly calls specifically for the identified Team Leads that identified the need to have explicit conversations about trust, harm, and healing at Learning Session 2. (See previous Promising Approach on Demonstrate Flexibility and Responsiveness.)

What are some ways to support a relationally-based, trusting shared learning environment?

Craft **pre-work activities for individuals** that tap into reflection and sharing about who they are, not what they do.

Craft **pre-work activities that intentionally build internal team dynamics and identities** within the individual teams, such as the development of a team name and motto.

Provide opportunities for all participants to **stay connected between the in-person** Learning Sessions, such as monthly all-team calls and online communication platforms.

Include multiple activities and opportunities for **participants to get to know one another** on a personal level. One example that served as the initial opening icebreaker for Learning Session 1 was the Five Circles Activity (in Appendix J).

Use **breakout sessions** at Learning Sessions to **mix up across teams** for meaningful sharing and discussions about challenges and strategies. Breakout sessions were well-received by participants in this LC, with 79% (N=28) of participants at Learning Session 3 agreeing that the breakout sessions helped them to create concrete strategies and identify opportunities for collaborations across teams and departments to move towards action.

4 **Create and Facilitate Identity-Based Affinity Groups** *(also called "Racial Affinity Groups")*

This construct is often used in anti-racist work to provide individuals with similar racial and/or cultural identities opportunities to come together in spaces where they can have particular race-based conversations. This was first done at Learning Session 1, where BIPOC staff expressed significant appreciation for the opportunity. As a note, not all white staff expressed the same positivity about the experience. Several white staff shared their frustration at being separated and they questioned if it was doing a disservice to the work by breaking the group apart in this way. Others did not understand the purpose, as they felt the work needed to happen exclusively in partnership with BIPOC staff. However, a core part of anti-racist work (as reflected explicitly in the Principles) is intentionally de-centering whiteness and white preferences so the decision was made to hear the appreciation from the BIPOC staff and continue to meet in this way at all three Learning Sessions.

These identity-based groups were convened at each of the three in-person Learning Sessions and two permanent groups emerged at CB following the first Learning Session: 1) Men of Color Leadership Support Group; and 2) Latinos/Hispanos en Acción group. These groups were critical to allow BIPOC staff to safely identify and discuss the real issues they face within the organization. It was this structure that inspired the BIPOC strategies that helped set the priorities for all work going forward. Further, these groups are equally essential for white staff so they can hold each other accountable for stepping into roles of solidarity.

Additionally, early in the Learning Collaborative, the Vice Presidents who identified as BIPOC decided to meet together in a separate identity-based group to share their own unique experiences as BIPOC leaders in the organization. This group met regularly throughout the LC to share experiences, provide mutual support and validation, and amplify their voices in the organization.

What do you need for effective identity-based affinity groups?

Identity-based affinity groups need **highly skilled facilitators** who reflect the identities of those in the group itself. They need to hold the space as well as coach and facilitate based on what the group needs. If doing identity-based affinity groups, white facilitators should anticipate discomfort and/or reluctance from white participants and should be well prepared to address this.

Among other topics, in these affinity groups, BIPOC participants can address internalized oppression. White participants can learn about internalized superiority and the impacts of both deconstruction and reconstruction. There also needs to be consideration given to **what identity-based affinity groups are desired** by the participants themselves. This can be particularly complex when there are very few staff of a specific identity as well as when there are staff who identify as multiple races/ethnicities and feel conflicted about which group to join.

5 Provide Opportunities for Regular Check-ins and Supportive Accountability

In most LCs, the work of participants and teams is primarily self-driven, however there is always a component related to supportive accountability led by the project staff and coaches. The frequency and style of the outreach, support, and accountability varies by LC, and because this LC was in a single organization and the project director was within the same organization, this role was pivotal in providing ongoing support to participants and teams. By checking in regularly with Team Leads as well as with participants in both structured and organic ways, the LC remained in the forefront. This also allowed participants and teams access to asking questions, gaining clarity, and sharing feedback in real time. LC teams ultimately needed significant individualized coaching, which should have been included as part of the structure rather than presented as an option.

Regular meetings of various types were also incredibly important throughout this process to ensure communication, coordination, and most of all relationship and trust building. Because there were so many meetings as part of this process, schedules were set far in advance on a regular schedule so that participants could block time and ensure they were able to participate. While many of the LC meetings were held virtually, teams were strongly encouraged to meet in person whenever possible. For team-specific meetings, teams were encouraged to decide on their own agendas.

REGULAR MEETINGS

Vice-President Meetings	Monthly
Team Lead Meetings	Monthly
Manager Meetings	Monthly
BIPOC Vice-President Meetings	Monthly
Planning Team /Coach Meetings	Monthly
All-Team Meetings	Monthly
Executive Leadership Team Meetings	Every Other Month
Individual Team Meetings	Ad hoc

More details on the purpose and participants of each meeting can be found in Appendix K.

Beyond the scheduled meetings, check-ins and accountability were also intended to be provided by coaches. The coaches for this LC came from outside of CB, providing fresh eyes, outside perspectives, and offering unfiltered reflections and guidance. The selection of coaches was masterful, as not only did these coaches have deep expertise in all aspects of the CCF (all four Principle Clusters in this LC), but they also truly knew the community, which was invaluable. The coaches played a variety of roles throughout the LC, including facilitating, coaching, teaching, and providing strategic support to the project overall. They also helped shape agendas, co-lead calls, facilitated activities and discussions at Learning Sessions, and worked directly with teams.

How can you offer regular check-ins and supportive accountability?

Provide regular opportunities for team members and teams to meet
with a **set frequency and clear purpose**.

Offer a **variety of types of meetings** with different groups and purposes.
Be clear on the participants, facilitation, agenda, and purpose of each meeting.

Set meeting schedules far in advance based on the availability of those who will be participating.
Putting time on participants' calendars early and consistently increases participation
(and saves valuable time in trying to schedule month-to-month).

❻ Create Opportunities to Conduct PDSAs (Small Tests of Change)

Plan-Do-Study-Act cycles (PDSAs) for small tests of change are introduced in all Learning Collaboratives to help participants move from ideas and broad strategies to concrete and specific small changes to test. Some, although not all, participants in this LC found this approach to be helpful as it gave them the ability to try their own ideas without relying on meetings and hierarchies for approval. However, there were limitations to the use of PDSAs in this LC. These included: the timing with which they were introduced; CB's hierarchy that made participants reluctant to test changes without permission; and focusing on the technical aspects of testing PDSAs rather than on the content of the work. From other LCs we have found that for PDSAs to be used effectively, participants must have confidence that they do not need approval to test ideas. They also need reinforcement and support for how to use the PDSA cycles over time, as they strive to move from small tests of change to sustainable practices.

In a traditional Learning Collaborative, PDSAs are introduced early on (at the first Learning Session). This may be too early to introduce them as there is a great deal of work related to relationship building, trust, and understanding what it means to deconstruct racism and WSC. For CB, they likely would have been more effective if they were introduced after the strategies related to trust, harm, and healing were identified by the BIPOC group at Learning Session 2. PDSAs may be a single tool that participants can eventually use to test some of their ideas, but they should not be a focus nor a distraction. They are certainly not the right tool to use for certain types of more complex practice and process changes.

As noted earlier, PDSAs are a key element in LCs and provide a mechanism to test changes in successive cycles that individuals are encouraged to try out on their own without the need to get permission from positional leadership. However, like many organizations, CB has a top down hierarchical structure and the perceived need to get permission before acting was embedded into the culture. This proved to be a barrier to testing PDSAs for some participants. Additionally, though PDSAs were tested by many participants and teams, they tended not to be in successive cycles. While some participants seemed to appreciate and try to test changes using PDSAs, other participants found them confusing or unhelpful.

What's a good way to start using PDSAs for this work?

Make sure that the **foundation around content is firmly laid**. Do not introduce them as a tool too early in the process as they risk becoming a distraction to the actual work.

Introduce them as a **single tool** for testing changes, but not as the only or a preferred tool.

Have confidence that **organizational hierarchies are dismantled** enough to support this approach.

Use **simple language** like "small tests of change" to avoid getting caught up in unnecessary jargon around PDSAs.

Have opportunities for **coaching and highly responsive feedback** to help participants see them as opportunities to change practices and processes and not just one-time activities.

Share a **PDSA worksheet** as it can be a helpful tool for participants who are interested in using this approach. The worksheet provides a real-time guide as well as structure to ensure the test is focused on the desired goal. It also serves as a reminder for the test to be studied, with the results being adapted into an expanded test as indicated.
(See PDSA Worksheet in Appendix L.)

Concluding Reflections

Changing organizational culture is difficult but not impossible. Deconstructing several centuries of deeply rooted racism and WSC takes time and determination. The need to deconstruct the micro-climates and subcultures that exist within different programs and teams brings added complexity. However, the process at CB allowed the previously unspoken to be spoken. For some staff (especially BIPOC staff) this felt empowering at times. Unfortunately, it also caused harm for some BIPOC staff who had previously experienced a positive anti-racist, supportive subculture within their teams prior to the initiative – and the LC process served to alert them to how protected they had been. For others (especially white staff) it was challenging in different ways as it elicited a sense of discomfort as their behaviors, beliefs, ways of being, and power were challenged. For some staff (both BIPOC and white), this effort was likely a precipitating factor in decisions to leave CB – some because it was not something they wanted to engage in and others because they felt it was still not enough or was moving too slowly. Indeed, the LC process can prompt a range of organizational disruptions, including staff turnover, which impact feelings of psychological safety and actual levels of commitment to TIAR practices.

Overall, for CB, this initiative resulted in progress in the desired short-term objectives for most participants: knowledge, skills, attitudes, and satisfaction/experience with the process. Some participants and teams also made progress in the two intermediate objectives: behavioral changes and decision-making/structural changes. However, there is still a long way to go in deconstructing WSC and racism in CB as they strive to reconstruct a trauma-informed, anti-racist organization.

CB's efforts continue through its five teams and 35 staff, representing various programs, who continue to meet on a regular basis. The TIAR Executive Leadership Team continues to meet with two consultants, in an effort to enhance its leadership capabilities. Furthermore, a TIAR Leadership Team has been established with the aim of creating additional strategies derived from the BIPOC List to develop an implementation plan. CB remains dedicated to delivering the Co-Creating Community Training Series for supervisors, supporting the integration of restorative practices within their respective teams. In addition, "Undoing Racism" workshops are accessible to staff and community partners, indicating CB's ongoing commitment to share resources and strengthen relationships with the community. Additionally, CB continues to partner with trainers supporting faith-based initiatives aimed at decolonizing mental health. The journey is long, but because we believe we must serve children, families, and communities in trauma-informed, anti-racist ways, we have no choice but to continue.

Part 6 Acknowledgements

This Learning Collaborative would not have been possible without the engagement, participation, and contributions of CB's staff participants, as well as partners who agreed to serve as coaches. We thank them for their passion, commitment, and willingness to join the journey.

PARTICIPANTS

Sarah Miller

Emily Oakes
Emma Ohlund
Hannah Milliken
Christine Montgomery

Rachel Aloi
Jamila Bello
Alice Forrester
Susan Kelley

Rosario Barbosa
Michelle Benitez
Tirzah Kemp
Marissa Marranzini

Kerry Ann Frank
Nowshin Tabassum

Lauren Weibrecht
Juli Cioffi-Smith
Chantell Thompson
Cara Klaneski
Leeora Netter

Alice Corrigan
Jamell Cotto
Vianette Hernandez
Marcquis Knox
Kitty Tyrol

Damaris Cox
Mikaela Honhongva
Calliope Hubbell
Frank LaVelle

Manuel Rivera
Nyrmin Vidro

Gisela Parra
Jennifer Cretella
Mike Riso
Michaelangelo Palmieri

Kimberly Farrar-Powell
Ilaria Filippi
Yari Ijeh
Marilena Mademtzi

Martha Plazas
Yolanda Lopez
Tiffani Wells
Melanie Rossacci

Stephanie Plude
Jerusha Rich
Shaina Rodriguez

Jennifer Richmond

PROJECT DIRECTOR VP OF ANTI-RACIST PRACTICE

Yohanna Cifuentes

COACHES

Brianna Dunn
Frances Padilla

Kyle Pedersen

Odell Montgomery Cooper

Glenda Santos

Sean Reeves
Chi Anako

Deborah Stanley-McAulay

Maria Oliva

CONSULTANTS

Elizabeth Thompson

Jen Agosti

APPENDICES

APPENDIX A:
CLIFFORD BEERS TRAUMA-INFORMED ANTI-RACIST JOURNEY PRIOR TO THE LEARNING COLLABORATIVE

Below are milestones in Clifford Beers's trauma-informed anti-racist journey prior to the Learning Collaborative:

- May-November 2021: CB senior leaders and program directors participated in the Promoting Racially Just Trauma-Informed Pediatric Integrated Care Collaborative (RJTI-PICC) Breakthrough Series Collaborative facilitated by Johns Hopkins Bloomberg School of Public Health. This effort was part of an NCTSN-funded initiative to implement trauma-informed, and anti-racist organizational, cultural, and clinical practices. CB's participation in this initiative informed the design thinking for the Learning Collaborative.

- January 2022: Created a new position, Vice-President of Anti-Racist Practice, to lead the effort on establishing anti-racist practices and coordinate ongoing training for all staff and community partners.

- February 2022: Started conversations with Jen Agosti and Elizabeth Thompson (NCTSN consultants) to understand the Learning Collaborative planning process, organizational readiness, commitment, expectations, and began preparing for meetings with the executive leadership team.

- March 2022: Hosted an all-staff meeting (258 staff were invited) to introduce what it means to be an anti-racist organization, the commitment to anti-racist practices, reviewed the five year organizational vision, and what the journey may entail (including Fear-Growth-Learning Zone Frame). Provided questions for breakout sessions where staff answered questions related to "How can Clifford Beers become an anti-racist organization: can we hold each other accountable and move towards action and growth?" Introduced the training opportunities to create a foundation to have these conversations and discussed the infrastructure: assessed how we are doing (use the RJTI PICC Collaborative Change Framework Assessment Tool); provided training opportunities; examined policies and procedures; encouraged conversations; promoted feedback; and fostered ongoing support.

- April 2022: Launched the RJTI Collaborative Change Framework Assessment Tool which was used in the RJTI PICC Learning Collaborative sponsored by Johns Hopkins to assess different organizational components such as Power, Family-Centered Care, Programming, Workplace Relations, Culture, Policies, and Practices and how these aspects relate to antiracism. The purpose of this survey was to evaluate staff's perceptions of current practices at CB, determine a baseline for where CB stands with regard to racial equity, and to develop a strategic plan for sustainable change.

- May 2022: Began working with the Executive Leadership Team and focused on relationship building, trust, racism, and WSC. Worked on messaging with Managers, Directors, and VPs. Monthly meetings were scheduled to keep everyone informed about the infrastructure being created such as calls and training opportunities. Supervisors were asked to begin thinking about ways their staff could participate in workgroups and training opportunities. Also began to offer trainings to staff: Emotional Emancipation Circles, Journey of Discovery, and Undoing Racism were part of these initial offerings. Collected pre and post data to begin to collect information about what staff thought were helpful trainings.

- July 2022: Hosted an all-staff meeting to review progress so far since the last meeting in March. Reviewed the Collaborative Change Framework Assessment Tool and its responses. (Received 102 responses and 91% of the 102 completed the survey.) Led facilitated breakout sessions for each section of the Change Framework Assessment focused on: What do you notice about these responses? How do these responses sit with your perceptions? In what ways does CB do/not do ….(question content)? Why is it important to advance these (question content)? During this meeting, also introduced opportunities to get involved in making changes by participating in what were then termed "workgroups" (which later became the Learning Collaborative).

- July 2022: During the monthly VP, Director, Manager meetings, continued the conversations about the need to develop strategies so staff could participate in workgroups - flexibility in their schedule, one less project, one less meeting. Also focused on the need to have representation from various departments.

- August 2022: Three staff members and one community partner attended the three-day SAMHSA/NCTSN All-Network Conference. This conference was focused on anti-racism and the presentations included information about the Principles of an anti-racist, trauma-informed organization. This information was shared with the Leadership Team with the plan to review, understand, and incorporate these Principles at Clifford Beers.

- September-October 2022: Started planning for the internal Learning Collaborative. Decision was made to focus the work on the Trauma Informed Anti-Racist (TIAR) Principle Clusters and the baseline data gathered from the RJTI-PICC Collaborative Change Framework.

- November-December 2022: Confirmed seven teams representing various programs within CB and Health Partners, including a total of 49 staff. Identified and engaged nine coaches representing each of the Principle Clusters. Scheduled orientations, Learning Sessions, and all meetings (see list of meetings in Appendix L). Based on staff feedback, scheduled two additional training sessions in December for the managerial team on Oppression and Real Talk.

- **Emotional Emancipation Circles:**
  A culturally grounded self-help support group process, developed in collaboration with the Association of Black Psychologists (ABPsi), to help Black people heal from the trauma caused by the lie of inferiority and work together to be free from it—once and for all.

- **A Journey of Discovery: On the Humanity of Black People:**
  A series of radically honest intra-racial and/or inter-racial conversations focused on the root cause of anti-Black racism and pathways to genuine healing.

- **Oppression and Real Talk:**
  Understanding the cycle of oppression. A conversation that unpacks how systems perpetuate racism (ism's) through the 5 I's of Oppression - Ideological, Institutional, Interpersonal, Internalized Oppression, Internalized Dominance. Introduction to difficult conversations, calling in and calling out.

- **Undoing Racism® Community Organizing Workshop:**
  Participants experience a humanistic process for laying a foundation to explore how we have been racialized, socialized, and conditioned to think about race and racism. We first analyze class, power and institutional/individual relationships to and within communities. As power is analyzed, participants explore how people play a role in maintaining the current disparate racial outcomes that every system and institution produces. This intensive, interactive process challenges participants to analyze themselves first, then the structures of power and privilege that hinder social equity and prepares them to be effective organizers for justice. The training instructs that an effective, broad-based movement for social transformation must be rooted in the following Anti-Racist Organizing Principles: analyzing power, developing leadership, identifying and analyzing manifestations of racism, learning from history, maintaining accountability, networking, and undoing internalized racial oppression.

- **Co-Creating Community/Restorative Practices[11]:**
  Using a restorative justice framework, community-building circles purposefully capitalize on the natural human need to be in community. Circles also offer tools that are easy to use and provide profound benefits to the individuals and the community. It is restorative because it restores humans to their natural state, which is to be in community, and it combats isolation and begins the repair of the toxic stress of isolation. Engaging in community-building circles helps everyone to become culturally aware and responsive, which in itself will lead to less conflict and separation. Circles also give the community a chance to help each other manage the grief resulting from the pandemic: illness, death, separation, loss of income and financial crisis. There are different types of circles: Community-building circles, Narrative based agreement circles to ensure everyone's values are understood and valued, Problem solving circles, Harm circles to address minor conflicts and harms that disrupt relationships.

11. Thorne, C. (2020). Meeting our needs through restorative practices. Restorative Practices Trainer.

APPENDIX C:
OVERVIEW OF TIAR LEARNING COLLABORATIVE

January 2023: Led coach orientation session

Kicked off pre-work with all LC participants online. Held first all-team call to formally launch the LC.

- Pre-work assignments included readings and reflections on the following pieces:
  - The Ones Who Walk Away from Omelas - Ursula K. Le Guin
  - White Supremacy Culture - Still here - Tema Okun
  - Being Anti-Racist is Central to Trauma Informed Care: Principles of an Anti-Racist, Trauma Informed Organization - NCTSN

- Teams were also asked to create their own Team Name and Motto related to this work

- All participants were asked to share their response to a question posed by a participant on the first all-team call: *What does it mean to you to live an anti-racist life?*

- Team Leaders joined a dedicated call

- Coaches joined several calls for orientation and Learning Session planning

February 2023: Learning Session 1 held

- Concentrated focus on:
  - Relational work (getting to know each other)
  - Common language and concepts, including White Supremacy Culture
  - Clusters 1 and 4 - Bearing Witness, Centering Voices, and Honoring Lived Experience; Human Resources, Staff Support, and Leadership Development
  - Model for Improvement – PDSAs – Strategies in Clusters 1 & 4
  - Cross-team time and team time
  - Identity-based groups

February-June 2023: Action Period 1

- Areas of focus during this time included:
  - Contracting – put money back into the community (e.g., catering, landscape work, etc.)
  - New language from Principles
  - Lack of communication within CB: Who does what? What is offered?

- Began offering a restorative practice training called Co-Creating Community (see Appendix B)

- Received consultation and partnership with People's Institute for Survival and Beyond (PISAB), developers and facilitators of Undoing Racism

- Overall lack of trust in the organization
  - Continuation of harms being perpetuated
  - Need for healing, especially for staff who identify as BIPOC

June 2023: Learning Session 2

- Areas of focus included:
  - Trust, Harm, and Healing (Identity groups and across groups)
  - Clusters 2 and 3 - Organizational Values, Governance, and Strategic Oversight; Structural Reforms Partnerships, and Systems Change

- Major agenda shift on Day 2 to focus on strategies related to Trust, Harm, and Healing by identity groups (creation of the "BIPOC List")

June-October 2023: Action Period 2

- Monthly meetings (described in Appendix K)

- Further refinement of BIPOC strategies

- Facilitated work with Executive Leadership Team

- Latino Integrated Rounds started monthly meetings (new initiative coming out of a need to discuss Latino families and support Latino staff - part of a PDSA from one of the teams)

- Two coaches began more directed work with leadership team around trust, harm, and healing, including facilitation of an in-person all-day meeting

- Focus on Co-creating Community: Led five Co-Creating Community trainings and two supervisor trainings

October 2023: Learning Session 3

- Areas of focus included:
  - Grief and loss; building community
  - Sharing progress and successes
  - Aligning the work (trust, harm, and healing /BIPOC list with TIAR Principle Clusters)

- Prioritized strategies in race-based identity groups to identify the following priority areas for ongoing work:
  - Pathways, Pipelines, and Promotions
  - Restorative and Reparative Practices
  - Internalized Oppression (Inferiority and Superiority)
  - Shared Decision-making & Shared Power
  - Valuing /Centering Voices AND Responding

N. Chineye (Chi) Anako

N. Chineye (Chi) Anako is a public health practitioner whose work has focused on the intersection of public health and health equity solutions. Past initiatives include work on nutrition insecurity/food justice, violence prevention in youth and the development of cultural and linguistic programs. Chi is currently the Regional Director of Diversity, Equity and Inclusion for Trinity Health Of New England. Chi is a trained anti-racist and unconscious bias facilitator and she also oversees the 3+1 Language Services Program which provides cultural and linguistic care to patients, especially those from marginalized groups.

In addition to her role at Trinity Health Of New England, Chi serves on the board of the Connecticut Chapter for the National Association for Health Services Executives (NAHSE), and is the immediate past president. Similarly, through her participation in UConn's College of Liberal Arts & Sciences' Women's Mentorship program, Chi contributes to the development and growth of a new generation of leaders. She also serves on the board of the Copper Beech Institute (CBI). Chi is an avid traveler and a native of Nigeria.

Yohanna Cifuentes, Ph.D.

Dr. Yohanna Cifuentes currently serves as the Vice President of Antiracist Practice at Clifford Beers Community Care Center in New Haven, CT. With over 20 years of experience as a licensed clinical social worker, Dr. Cifuentes has dedicated her career to providing bilingual and bicultural services to individuals of all ages and families. She has predominantly focused her work in child guidance clinics, catering to monolingual-Spanish speaking children and families.Driven by a passion for leadership and organizational transformation, Dr. Cifuentes pursued a PhD in Industrial and Organizational Psychology. Leveraging her expertise, she now spearheads initiatives to drive systemic change within organizations. Through her career as a bilingual clinician in New York, Puerto Rico, and Connecticut, Dr. Cifuentes recognized systemic issues affecting the families she served, regardless of location. This realization motivated her to explore issues of oppression and their impact on the families, the service providers, and the agencies.

Currently, Dr. Cifuentes is dedicated to developing a Trauma-Informed Antiracist Whole Family Approach to address structural racism at the organizational level. Her overarching goal is to create a model that can guide other organizations in becoming trauma-informed and antiracist, ultimately improving service delivery. Beyond her role, Dr. Cifuentes actively contributes to the advancement of antiracist practices. She is an active member of the Committee on Diversity, Equity, and Inclusion in Behavioral Health; and participates in various workgroups within the National Child Traumatic Stress Network including the Practice-Based to Evidence group, the Latin American Children and Families group, the Racial Justice Subcommittee, and the Secondary Traumatic Stress Collaborative. Through her multifaceted efforts, Dr. Cifuentes continues to advocate and support trauma-informed and antiracist organizational change.

Brianna Dunn, MPH

Brianna Dunn is a Program Evaluator in the Quality Analytics & Research (QAR) Department at Clifford Beers. Her dedication to eliminating health disparities began as a Research Assistant with QAR in 2018. While developing metrics and analyzing data for programs including School-based Health Clinics, New Haven Trauma Coalition, and CATCH, she witnessed first-hand how utilizing data to assess needs and strategically remove barriers to care can positively impact lives. In 2019 while pursuing her graduate degree, she completed an internship with Clifford Beers where she reviewed internal processes, policies, and procedures through a health equity lens. It was during this time and as a result of her research that she developed a passion for advocating for equitable, quality health care through data storytelling. She joined the TIAR team in April 2022.

Outside of Clifford Beers, Brianna is the Communications Manager and Public Information Officer for First 5 Santa Barbara County, an agency focused on mobilizing and integrating communities to prepare children to thrive in Kindergarten and life. She is passionate about using her knowledge and skills gained as a Researcher and Evaluator with Clifford Beers to braid data storytelling and racial justice into her agency's communications and advocacy efforts. Brianna lives in Southern California with her partner, daughter, and adopted pup.

Rev. Odell Montgomery Cooper, Ph.D.

Rev. Dr. Odell Montgomery Cooper is the Executive Director for Interruptions: Disrupting the Silence, (IDS) LLC, built from a true story that details her journey after her son, Jonathan, was murdered in a case of mistaken identity, becoming another victim of gun violence. The mission of IDS is to use a shared voice to shed light on structural racism and inequities of mental health in our inherited traditions across faith, culture, and societal stigmas.

Maria Elena Oliva, Ph.D.

Dr. Maria Elena Oliva was the Director of Social Work at the Connecticut Mental Health Center in New Haven, CT. Maria oversaw the social work department and provided leadership in Dialogues on Difference, the agency's ongoing practice on engaging in challenging and difficult conversations on race and experiences of inequities. Maria was a licensed clinical social worker with her doctorate degree from Smith College School of Social Work in Northampton, MA. Her research was centered around the professional development of bilingual social workers and their experience in supervision.

As a child immigrant to the United States from Cuba, Maria lived and was educated within the duet of two languages. She believed that it is these voices that always reminded her of home and that spoke to her in the language of the heart. This experience of language provided a way for her to think about the impact of bilingualism in psychotherapy and the impact of bilingualism in a social workers' training.

Frances G. Padilla

Frances Padilla is the recent past president of Universal Health Care Foundation of Connecticut where she served in various leadership roles since 2004 and as president since 2012. There, Frances led Universal and other organizations and funders in committing to strengthening the capacity and infrastructure of community organizing to build grassroots power for racial, health and social justice in CT over the next decade. A great source of pride for Frances is the progress achieved in the state to expand coverage to immigrants regardless of documentation status, work led by immigrants themselves.

Over the past several years, Frances has led Universal's work to become an antiracist organization, rigorously examining its policies and practices and how to change inside-out to realize its vision of health equity and access to affordable and quality care for all CT residents, especially those most impacted by racial and ethnic disparities. This work has occurred at all levels of the organization, including the board and staff and is an ongoing commitment. It is intertwined with Universal's commitment to investing in the community infrastructure for building power for racial, health and social justice. Currently, Frances advises the Community Health Equity Accelerator initiative of the Office of Health Equity Research at Yale School of Medicine to act on health equity issues such as pediatric asthma in New Haven and beyond. Other commitments include the advisory committee of the Tow Youth Justice Institute at the University of New Haven and the board of Vital Capital, a nonprofit community development lender to federally qualified health centers nationally. Frances lives in New Haven with her family, loves to spend time with her grandchildren and on her diverse interests.

Kyle Pedersen, MAR

Kyle Pedersen has worked for Connecticut Mental Health Center since 2002, is currently Director of the CMHC Foundation, and has more than 20 years experience in community mental health and nonprofit leadership in New Haven and New York City. In the Department of Psychiatry he co-chairs the Project Synapse workplace improvement initiative and the Staff Sub-committee of the Anti-Racism Task Force. Kyle is skilled in executive leadership; strategic planning; new program development; sound fiscal management; donor relations and fund development; community connections; supervision of staff, volunteers, and interns; and training and education for students and learners of all ages. He is an anti-racist trainer/organizer with the Elm City-Undoing Racism Organizing Collective and People's Institute for Survival and Beyond; deacon for Trinity Episcopal Church and the Episcopal Church at Yale; treasurer of Gather New Haven; on the boards of Beulah Land Development Corporation and Citywide Youth Coalition; and has served on boards of other local and regional organizations. Kyle enjoys cooking, gardening, reading, and messing around in small boats.

Sean Reeves

Outreach & Community Engagement Coordinator · Connecticut Against Gun Violence, Co-founder of S.P.O.R.T. Academy. Sean Reeves is CEO of PrintzOnDeck LLC, Founder of Motivate Kids Inc., Co-founder of S.P.O.R.T. Academy Inc. serial Entrepreneur. Through the trails of being formerly incarcerated, losing his oldest son to community gun violence in 2011, Sean has become focused on creating meaningful lasting change within his community. Motivate Kids Inc was founded on the premise that youth development in areas of entrepreneurship, workforce development in the areas of skilled trades alongside of financial literacy and the practice of Conflict Management and Reconciliation principles we can develop more opportunities for sustainability within the households of families currently deemed low-income. Working with organizations like Project Longevity, City of New Haven Police Department and other community partners such as Clifford Beers, Sean's vision is to create pathways and connections that restore resources and opportunities for youth and family development.

Glenda Santos

Glenda is a CBC Caregiver and the mother of three children. Her oldest is her Son who is 18 years old in his first year of college and her second oldest is her 14 year old autistic daughter who receives services with CBC. Her youngest daughter is 20 months old and has Turner's Syndrome. She's been a caregiver since before she had any children of her own, so when it comes to advocacy she feels blessed to be able to use her own experience with caregiving to be the mother she is today raising her two youngest children and her daughters with special needs.

Deborah Stanley-McAulay

Deborah Stanley-McAulay is the Associate Vice President of Employee Engagement & Workplace Culture at Yale University. In her role, she oversees the Office of Diversity & Inclusion, WorkLife and Child Care Programs, and New Haven Hiring Initiative. Deborah has oversight of the University's progress in staff diversity; as well as to ensure and facilitate an integrated vision and shared responsibility for diversity. She works with internal university departments and external organizations and agencies and serves as the University's chief liaison with the University's eight Affinity/Employee Resource Groups; Yale African American Affinity Group (YAAA), Yale Latino Networking Group (YLNG), Asian Network at Yale (ANY), Yale University Lesbian Gay Bisexual Transgender Queer Affinity Group (LGBTQ), Yale University Working Women Network (WWN) Yale Veterans Network (YVN), Future Leaders of Yale (FLY) and DiversAbility at Yale (DAY). Additionally, Deborah co-published her first article, in 2017, entitled, How to Unplug the Leaky Bucket: "Retention Strategies for Maintaining a Diverse Workforce, printed in the May/June 2018 issue of EDUCAUSE Review.

Prior to joining Yale University, Deborah served in a learning and development role at several institutions: Hospital of Saint Raphael, New Haven, CT, Stop and Shop, Companies, North Haven, CT, New Haven Adult & Continuing Education Center, New Haven Board of Education, and South Central Community College. Deborah is an active member of several organizations: Delta Sigma Theta Sorority, Inc, New Haven Alumnae Chapter, Marrakech, Inc. (Secretary) and State Educational Resource Center (Treasurer). Deborah is a native of New Haven, where she resides with her family.

CONSULTANTS

Jen Agosti

Jen Agosti is the founder and president of JRA Consulting, Ltd. and provides consulting services focused on the transformation of organizational cultures in child and family service organizations. She helped adapt the Breakthrough Series Collaborative methodology from the health care arena to child welfare in 2001 and worked closely with the National Child Traumatic Stress Network in 2005 to further adapt the model for the field of child trauma. By facilitating brave spaces, authentic and challenging dialogues, strategic thinking, small tests of change, implementation science, self-reflection, and experiential learning, all of those involved in and affected by these systems are able to collaborate in their efforts to change and improve systems. Jen serves as a consultant to and partner in Breakthrough Series Collaboratives, Learning Collaboratives, and change initiatives being conducted by public and tribal child welfare agencies, child trauma agencies, health care organizations, and nonprofits across the country. Jen is the proud mom of 18-year old twins and loves to eat, cook, hike, laugh, and spend time with friends.

Elizabeth A. Thompson, Ph.D.

Dr. Elizabeth Thompson (Thompson Leadership Consulting, LLC) is a consulting psychologist with an established record of facilitating racial justice initiatives within and across teams and organizations. She is a member of the National Child Traumatic Stress Network's anti-racism's faculty that co-developed Principles of an Anti-Racist, Trauma-Informed Organization (2022) and is currently working with several agencies on their efforts in this arena. Since 2015, Dr. Thompson has made both national and international presentations on dismantling systems that perpetuate racism. Prior to founding her consulting practice, Dr. Thompson had a 30 - year history as a mental health executive in the child traumatic stress field where she optimized service quality and delivery to children, families and communities.

These principles are taken from *Being Anti-Racist Is Central to Trauma-Informed Care: Principles of an Anti-Racist, Trauma-Informed Organization*, accessed online at https://www.nctsn.org/resources/being-anti-racist-is-central-to-trauma-informed-care-principles-of-an-anti-racist-trauma-informed-organization.

Citation: Powell, W., Agosti, J., Bethel, T.H., Chase, S., Clarke, M., Jones, L.F., Lau Johnson, W.F., Noroña, C.R., Stolbach, B.C., & Thompson, E. (2022). Being anti-racist is central to trauma-informed care: Principles of an anti-racist, trauma-informed organization. Los Angeles, CA & Durham, NC: National Center for Child Traumatic Stress.

Principles of an Anti-Racist, Trauma-Informed Organization

CLUSTER 1. BEARING WITNESS, CENTERING VOICES, & HONORING LIVED EXPERIENCE

We proactively center, amplify, and learn from the voices of those most impacted by racism and trauma, bearing compassionate and non-judgmental witness to their stories and realities.

We honor each individual's intrinsic value, lived experience, humanity, and innate strengths, including the various unique social identities they embody (e.g., race, gender identity, ethnicity, sexual orientation) and the strengths and protective factors of their communities.

CLUSTER 2. ORGANIZATIONAL VALUES, GOVERNANCE, & STRATEGIC OVERSIGHT

We commit to equity-based governance, power redistribution, and shared decision-making processes across all staffing levels and with the communities we serve.

We acknowledge the impact of racism, historical trauma, power dynamics, and systemic inequities.

We commit to taking sustained steps to dismantle racism, white supremacy, and privilege in our structures,policies, procedures, practices, performance evaluations, and outcomes.

We promote accountability and transparency in decision-making and leadership with all those who are impacted, including partners and those accessing services.

CLUSTER 3. STRUCTURAL REFORMS, PARTNERSHIPS, & SYSTEMS CHANGE

We commit to socio-structural reforms and promote practices designed to foster truth, atonement, and collective repair and to enhance radical healing of people who are Black.

We commit to addressing conflicts when partners and funding sources actively cause harm to Black communities and/or limit anti-racist work.

We acknowledge the ways in which systems have been used to control and destroy Black bodies and harm Black families, and that understanding informs how we engage with and confront those systems.

CLUSTER 4. HUMAN RESOURCES, STAFF SUPPORT, & LEADERSHIP DEVELOPMENT

We prioritize the hiring, development, promotion, and retention of people who are Black at all levels of the organization.

We value, support, and cultivate leaders and managers who continually examine, acknowledge, and address the ways in which they and their organizations may contribute to oppression.

We support holistic well-being for Black staff.

We assume responsibility for providing staff with the necessary knowledge and skills required to support staff and deliver care to Black communities.

We seek, implement, and invest in interventions and innovations designed by Black practitioners and in close collaboration with Black communities.

Learning Session 2 Mentimeter Questions

Which of these conditions are present at Clifford Beers?

Examples of response options included:

Rumors and gossip

Lack of communication

Secrecy or hidden agendas

Dishonesty

Aloofness or lack of approachability

Low employee engagement

Which of these behaviors have you experienced at Clifford Beers?

Examples of response options included:

Information was withheld

BIPOC staff were treated unfairly

Confidentiality was broken

Promises were broken

BIPOC staff were not recognized

Please note that these Mentimeter response options were predetermined checkbox options created and pre-loaded by the Planning Team based on discussions with participants, teams, and coaches after Learning Session 1. Participants were unable to create individual write-in responses.

Becoming Anti-Racist

Fear Zone
- I deny racism is a problem.
- I avoid hard questions.
- I strive to be comfortable.
- I talk to others who look & think like me.

Learning Zone
- I recognize racism is a present & current problem.
- I seek out questions that make me uncomfortable.
- I understand my own privilege in ignoring racism.
- I education myself about race & structural racism.
- I am vulnerable about my own biases & knowledge gaps.
- I listen to others who think & look differently than me.
- I surround myself with others who think & look differently than me.

Growth Zone
- I identify how I may unknowingly benefit from Racism.
- I promote & advocate for policies & leaders that are Anti-Racist.
- I sit with my discomfort.
- I speak out when I see Racism in action.
- I educate my peers how Racism harms our profession.
- I don't let mistakes deter me from being better.
- I yield positions of power to those otherwise marginalized.

Source: Andrew M. Ibrahim MD, MSc. Asst. Prof Surgery, Architecture & Urban Planning, University of Michigan

MONOCULTURAL ==> MULTICULTURAL ==> ANTI-RACIST ==> ANTI-RACIST MULTICULTURAL
Racial and Cultural Differences Seen as Deficits ==> Tolerant of Racial and Cultural Differences ==> Racial and Cultural Differences Seen as Assets

Exclusive An Exclusionary Institution	2. Passive A "Club" Institution	3. Symbolic Change A Compliance Institution
· Intentionally and publicly excludes or segregates African Americans, Native Americans, Latinos, and Asian Americans · Intentionally and publicly enforces the racist status quo throughout institution · Institutionalization of racism includes formal policies and practices, teachings, and decision making on all levels · Usually has similar intentional policies and practices toward other socially oppressed groups such as women, gays and lesbians, Third World citizens, etc. · Openly maintains the dominant group's power and privilege	· Tolerant of a limited number of "token" People of Color and members from other social identify groups allowed in with "proper" perspective and credentials. · May still secretly limit or exclude People of Color in contradiction to public policies · Continues to intentionally maintain white power and privilege through its formal policies and practices, teachings, and decision making on all levels of institutional life · Often declares, "We don't have a problem." · Monocultural norms, policies and procedures of dominant culture viewed as the "righ" way" business as usual" · Engages issues of diversity and social justice only on club member's terms and within their comfort zone.	· Makes official policy pronouncements regarding multicultural diversity · Sees itself as "non-racist" institution with open doors to People of Color · Carries out intentional inclusiveness efforts, recruiting "someone of color" on committees or office staff · Expanding view of diversity includes other socially oppressed groups But... · "Not those who make waves" · Little or no contextual change in culture, policies, and decision making · Is still relatively unaware of continuing patterns of privilege, paternalism and control · Token placements in staff positions: must assimilate into organizational culture
4. Identity Change An Affirming Institution	5. Structural Change A Transforming Institution	6. Fully Inclusive Anti-Racist Multicultural Organization in a Transformed Society
· Growing understanding of racism as barrier to effective diversity · Develops analysis of systemic racism · Sponsors programs of anti-racism training · New consciousness of institutionalized white power and privilege · Develops intentional identity as an "anti-racist" institution · Begins to develop accountability to racially oppressed communities · Increasing commitment to dismantle racism and eliminate inherent white advantage · Actively recruits and promotes members of groups have been historically denied access and opportunity But... · Institutional structures and culture that maintain white power and privilege still intact and relatively untouched	· Commits to process of intentional institutional restructuring, based upon anti-racist analysis and identity · Audits and restructures all aspects of institutional life to ensure full participation of People of Color, including their world-view, culture and lifestyles · Implements structures, policies and practices with inclusive decision making and other forms of power sharing on all levels of the institutions life and work · Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities · Anti-racist multicultural diversity becomes an institutionalized asset · Redefines and rebuilds all relationships and activities in society, based on anti-racist commitments	· Future vision of an institution and wider community that has overcome systemic racism and all other forms of oppression. · Institution's life reflects full participation and shared power with diverse racial, cultural and economic groups in determining its mission, structure, constituency, policies and practices · Members across all identity groups are full participants in decisions that shape the institution, and inclusion of diverse cultures, lifestyles, and interest · A sense of restored community and mutual caring · Allies with others in combating all forms of social oppression · Actively works in larger communities (regional, national, global) to eliminate all forms of oppression and to create multicultural organizations.

Trauma Informed Anti-Racist (TIAR) Learning Collaborative 2023
Learning Session 1 Agenda
February 22-23, 2023

Participant Agenda
Learning Session One Objectives

- Teams continue getting to know each other to create trust as well as a true collaborative learning environment.

- Teams develop common language, common understanding, and common priorities based on the TIAR Principles, with a focus on Clusters 1 and 4.

- Teams understand basic LC methodology, including Model for Improvement, how to do small tests of change (PDSAs), and the importance and purpose of measuring progress.

- Teams exchange information with each other and Faculty regarding successful strategies to promote and sustain a TIAR organization at Clifford Beers.

- Teams develop actual small tests of change (PDSAs) that they can test "by next Tuesday" along with action plans.

Wednesday, February 22, 2023

Planned Time	Session
8:30-9:00	BREAKFAST AND SIGN IN
9:00-9:45	Welcome and Team Introductions
9:45-10:30	Who We Are as Individuals
10:30-10:45	BREAK
10:45-12:00	Building Trust and Authentically Dismantling White Supremacy Culture
12:00-12:45	LUNCH
12:45-1:15	Large Group Sharing about Antidotes
1:15-1:30	Level Setting on the Principles
1:30-1:40	BREAK
1:40-2:40	Cluster 1: Bearing Witness, Centering Voices, & Honoring Lived Experience
2:40-3:10	Cluster 1 Team Meeting: Self-Assessment
3:10-3:20	MOVE TO BREAKOUT SESSIONS
3:20-4:05	Cluster 1 Cross-Team Breakout Sessions: Identifying Concrete Strategies
4:05-4:15	BREAK /MOVING BACK TO TEAM MEETINGS
4:15-4:30	Large Group Debrief and Reflections

Thursday, February 23, 2023

Planned Time	Session
8:30-9:00	BREAKFAST
9:00-9:30	Opening and Reflections from Day One
9:30-10:30	Cluster 4: Human Resources, Staff Support, & Leadership Development
10:30 – 10:40	BREAK
10:40-11:10	Cluster 4 Team Meeting: Self-Assessment
11:10-11:15	MOVE TO BREAKOUT SESSIONS
11:15-12:00	Cluster 4 Breakout Sessions: Identifying Concrete Strategies
12:00-12:30	LUNCH

12:30-1:30	Moving from Strategies to Small Tests of Change and Making Sure Changes Are Improvements
1:30-2:15	Team Meeting: What Changes Can We Test that Will Result in Improvements?
2:15-2:25	BREAK
2:25–2:55	Sharing Plans for Action
2:55-3:10	Personal Commitments
3:10–3:30	Closing Reflections, Evaluations and Adjourn
3:30	ADJOURN

Trauma Informed Anti-Racist (TIAR) Learning Collaborative 2023
Learning Session 2 Agenda: June 1-2, 2023

Participant Agenda
Learning Session Two Objectives

- Teams continue getting to know each other to create trust and deepen relationships.

- Teams continue to exchange information with each other and coaches regarding successful strategies with an intentional focus on Clusters 1 and 4.

- Teams identify opportunities for testing changes that build trust, address harm, and promote healing, with a focus on Cluster 2.

- Teams develop PDSAs that they can test "by next Tuesday" along with other strategies that focus on creating and sustaining a trauma-informed, anti-racist organization at Clifford Beers.

Thursday, June 1, 2023

Planned Time	Session
8:30-9:00	BREAKFAST AND SIGN IN
9:00-9:45	Welcome and Learning Session 1 Recap
9:45-10:15	Team Re-Introductions and Leadership Reflections
10:15-10:45	Framing the Foundational Elements
10:45-11:00	WELLNESS BREAK (Mindfulness)
11:00-12:00	Exploring the Concept of Trust: Affinity Groups
12:00-12:45	LUNCH
12:45-1:15	Talking Across Affinity Groups: A Fishbowl on Harm and Healing
1:15-1:20	MOVE TO MIXED GROUPS
1:20-2:05	Mixed Group Discussions on Trust, Harm, and Healing
2:05-2:20	WELLNESS BREAK (Salsa!)
2:20-3:15	Large Group Sharing Across Groups
3:15-3:20	MOVE TO TEAMS
3:20-4:00	Team Time: Moving to Strategies
4:00-4:20	Team Sharing and Reflections
4:20-4:30	Closure for the Day

Friday, June 2, 2023

Planned Time	Session
8:30-9:00	BREAKFAST
9:00-9:15	Opening and Reflections from Day One
9:15-10:00	Cluster 2: Organizational Values, Governance, & Strategic Oversight
10:00-10:30	Cluster 2 Team Meeting: Self-Assessment
10:30-10:45	WELLNESS BREAK (Bodywork Exercise)
10:45-11:15	What Does Progress Look Like?
11:15-11:20	MOVE TO BREAKOUT SESSIONS
11:20-12:00	Cluster 2 Breakout Sessions: Identifying Concrete Strategies
12:00-12:30	LUNCH
12:30-12:45	Moving from Strategies to Small Tests of Change
12:45-1:15	Team Meeting: What Changes Can We Test that Will Result in Improvements?
1:15–1:35	Sharing Plans for Action
1:35-1:45	Accountability Buddies
1:45–2:00	Closing Reflections, Evaluations, and Adjourn

Trauma Informed Anti-Racist (TIAR) Learning Collaborative 2023
Learning Session 3 Agenda: October 4-5, 2023

Participant Agenda

Learning Session Three Objectives

- Participants spend time together in community, in grief and support.
- Participants understand the connections, alignment, and interwoven nature of the Principles of TIAR Organizations, the BIPOC strategies identified at Learning Session 2, and the concepts of Harm, Healing, and Trust.
- Participants and teams continue to exchange information with each other and coaches regarding progress and successful strategies as identified by BIPOC staff at Learning Session 2.
- Teams identify opportunities, along with concrete and actionable plans, to spread and sustain promising strategies across other teams and Clifford Beers.

Wednesday, October 4, 2023

Planned Time	Session
8:30-9:00	BREAKFAST AND SIGN IN
9:00-9:45	Honoring and Celebrating Dr. Maria Elena Oliva
9:45-10:00	Time for Dancing and Other Ways to Process the Grief
10:00-10:15	BREAK
10:15-11:15	Coming Back Together
11:15-12:00	Linking BIPOC Lists, 3 Concepts, and Principles
12:00-1:00	LUNCH
1:00-1:45	Celebrating Progress
1:45-2:00	BREAK AND MOVE TO IDENTITY-BASED GROUPS
2:00-3:00	Prioritization of Strategies in Identity-Based Groups (BIPOC / White)
3:00-3:15	BREAK FOLLOWED BY COMING BACK TOGETHER ACTIVITY

3:15-4:15	Large Group Sharing Across Groups
4:15-4:30	Closure for the Day and Day 1 Evaluation

APPENDIX J:
FIVE CIRCLES ACTIVITY

This activity was used at the first Learning Session to develop relationships. It is intended to provide an opportunity to reflect on personal identities and then connect with others in brief, but meaningful ways. This activity can be adapted in a number of ways, depending on the size of the group, the logistics (e.g., room setup), and the time allotted. Ideally it is done with ample open space for participants to mix and mingle.

Set-Up and Opening Instructions

The purpose of this activity is to provide participants with an opportunity to reflect on the various identities they each bring into the space – and to honor and value each one of them. We are so much more than a professional role or title. We are each multi-faceted beings with deep expertise, experiences, and perspectives, which is precisely what makes meetings such as this one so rich.

There are three parts to this activity.

Part 1 (5 min.):

- Take a piece of paper and find a pen.

- Draw five circles however you want.

- In each circle, write one aspect of your identity. There are no rules or guidelines for this. While we know that you carry more than 5 identities, think about 5 that really matter to you in this moment.

- Take a moment to read your identities and smile as you reflect on who you are.

Part 2 (15 min.):

- Now stand up and bring your paper and pen with you. Your goal is to find at least one person who shares one of your identities with you. To do this, you'll need to mix and mingle and talk to a lot of people because ideally, you'll want to find a different person for each identity (if possible).

- You can find multiple people for each identity, but do your best to talk with as many people as possible to find commonalities and to share and honor differences.

Part 3 (20 min.): Large Group Discussion

- Invite participants to share what it was like to write five different aspects of their identity.

- Invite sharing about the experiences they had talking to others in this way. What was it like to find similarities? What was it like to hear about differences? What was it like to talk about who you are and not just what you do?

- How did this activity shape or reshape the way you think about your colleagues?

APPENDIX K:
TABLE OF MEETINGS DURING THE LEARNING COLLABORATIVE

Meeting Type	Meeting Purpose	Participants	Frequency
VP Meeting	Review WSC characteristics; discuss how WSC was embedded in the organizational culture; identify antidotes to help dismantle WSC within the organization.	All CB Vice Presidents	Monthly
Team Lead Meeting	Share information about their teams; discuss how staff was responding to trainings, meetings; have conversations about the journey of becoming TIAR organization; share strategies for responding to employees who were challenged by the work; get coaching on work being done. Created an infrastructure to support productivity requirements (codes employees could use for trainings and LC participation).	Identified Team Leaders from each LC team with planning team and coaches	Monthly
Manager Meeting	Feedback/brainstorming meetings, including how to break down silos, how to make sure the TIAR work was happening at different levels of the organization, how to answer questions their staff were bringing to them.	CB Managers and VP of Anti-Racist Practice	Monthly
BIPOC VP Meeting	Provide a space to process experiences and strategize how to provide mutual support, become, and stay involved in the process.	VPs who identified as BIPOC	Monthly
Planning Team / Coach Meeting	Plan for all-team calls and Learning Sessions; respond to issues as they arose with participants and/or teams; share progress and challenges related to individual teams and overall TIAR work at CB.	Planning Team and Coaches	Monthly
All-Team Meeting	Learn about what other teams were working on; ask questions that were coming up; share challenges and successes; receive coaching; have challenging discussions.	All members of all LC teams with planning team and coaches	Monthly
Executive Leader-ship Team	Support the work throughout the organization with a focus on spread and sustainability.	Executive Leadership Team with two coaches (facilitators)	Every other month
Individual Team Meetings	Discuss opportunities for PDSAs and strategies in their individual program areas (Note: Coaches were assigned to each team for additional support and guidance. Although the ideal was for the coaches to work directly with individual teams through the entire LC, that was inconsistent across coaches and teams.) Each team met with varying frequency throughout the LC.	Teams with planning team and assigned coaches as invited	Ad hoc

PDSA Planning Form

Team Name: _____   **Date:** _____

Cluster Area: _____   **Cycle #:** _____

PDSA Title: _____

THREE FUNDAMENTAL QUESTIONS FOR IMPROVEMENT

What are we trying to accomplish? (aim or goal for this PDSA cycle)

How will we know a change is an improvement? (measure)

What ideas do we have that will result in an improvement? (chage ideas)

PLAN

What is your first test?

What do you predict will happen?

What is the plan for the cycle? What are the steps to execute the cycle (who, what, where, when)?

What data will you collect? (who, what, when, where)

DO

Carry out the cycle. In brief terms, did it work as you expected?

STUDY

Summarize and analyze the observed results. What did you learn from this cycle? What does the data tell you? Include descriptions of successful interactions, unexpected challenges, and other special circumstances that may or may not have been part of the plan.

ACT / ADJUST

What actions are you going to take as a result of this cycle? (check one)

◯ Adjust the Test   ◯ Expand the Test   ◯ Abandon the Test

PLan for the next cycle. What changes are needed? If expanding or adjusting, what will you di to continue your learning while beginning to spread the successes? What questions do you still have?