Jewish Federations of North America

Center on Aging, Trauma, and Holocaust Survivor Care

Foundations of the PCTI Approach

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Objectives

- Identify the prevalence and impact of trauma experienced by older adults
- Understand the principles of the person-centered, trauma-informed (PCTI) approach
- Discuss strategies to infuse the PCTI approach into direct service, organizational practice, and policies and procedures
- Understand how leadership can foster a PCTI environment

Our Work



Grant Making



Training



Coaching



Evaluation



Research

Presenters



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What is Trauma?

Trauma

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

SAMHSA, 2014

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SAMHSA, 2014

Health & Trauma

An individual's trauma exposure is linked to their propensity for developing a wide range of conditions that negatively impact their health.

Cognitive Health. Dementia, sleep disorders, cognitive impairments

Mental Health. Anxiety, depression, suicidal ideation, mood disorders, substance abuse

Physical Health. Lung disease, gum disease, fibromyalgia, chronic fatigue, cardiovascular disease, gastrointestinal disorders, endocrine disorders, reproductive disorders

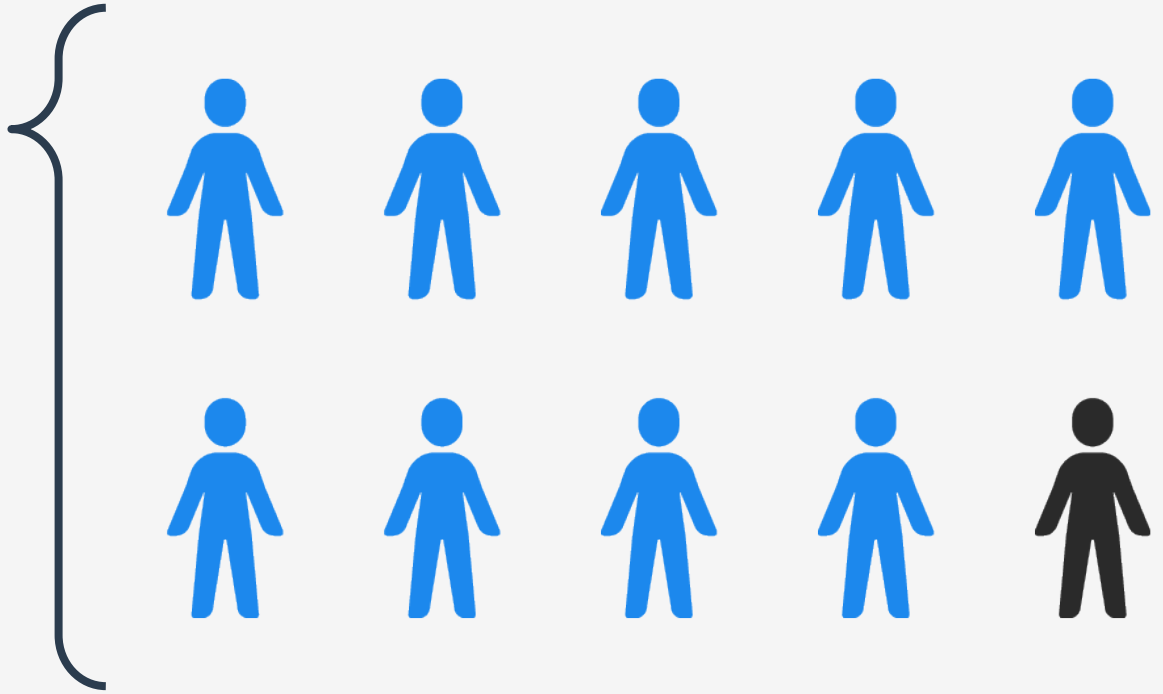
Trauma Triggers

Veterans	Holocaust Survivors	Refugees
Fireworks	Medical Procedures	Elections

Trauma Prevalence

90%

As many as 90% of older American adults have experienced a traumatic event in their lifetime.



Kilpatrick et al., 2013

What is the PCTI Approach?

PCTI Combines...

Trauma-Informed Principles

Person-Centered Principles

The PCTI Approach

The person-centered, trauma-informed (PCTI) approach is a holistic model of care that promotes the health and well-being of individuals by accounting for the role of trauma across the life course and by resisting re-traumatization, while also focusing on the strength, agency, and dignity of the person receiving care.

The PCTI Approach

The person-centered, trauma-informed (PCTI) approach is a holistic model of care that promotes the health and well-being of individuals by **accounting for** the role of trauma across the life course and by resisting re-traumatization, while also focusing on the strength, agency, and dignity of the person receiving care.

SAMHSA's Six Principles of a Trauma-Informed Approach

1. Safety
2. Trustworthiness & Transparency
3. Peer Support
4. Collaboration & Mutuality
5. Empowerment, Voice, & Choice
6. Cultural, Historical, & Gender Considerations

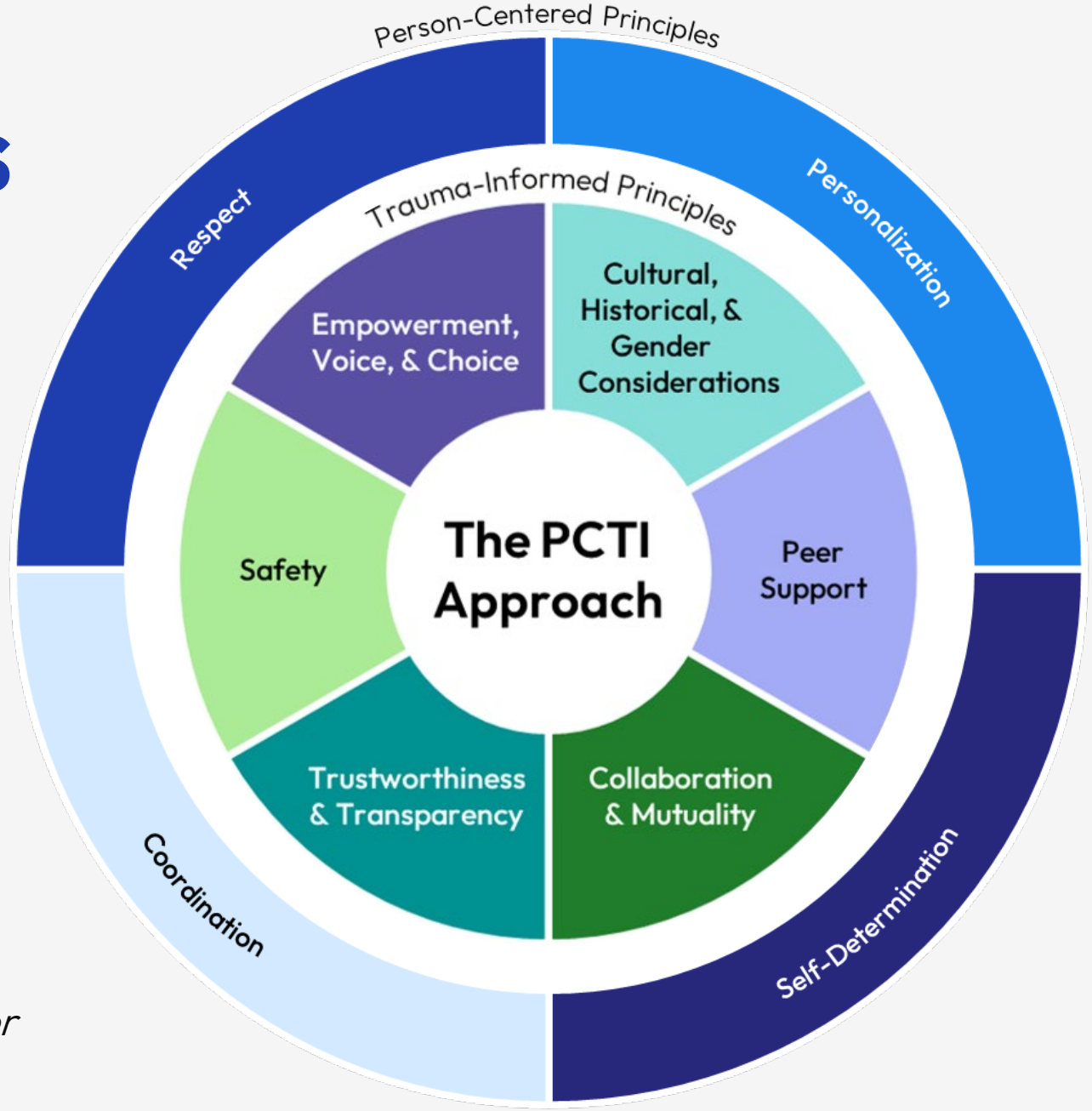
SAMHSA, 2014

Four Principles of the Person-Centered Approach

1. Personalization
2. Self-Determination
3. Coordination
4. Respect

PCTI Principles

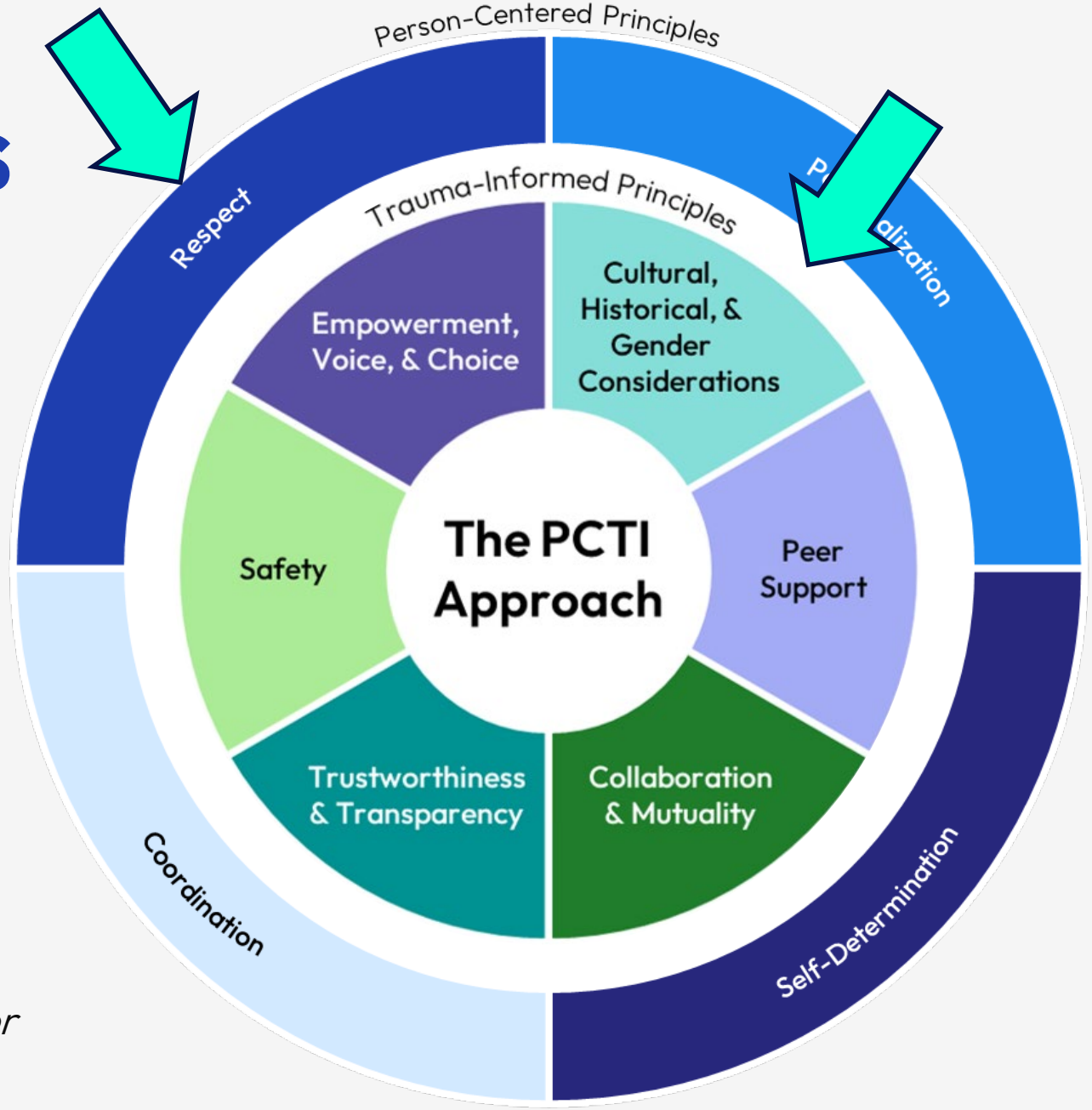
The PCTI approach implements SAMHSA's principles of trauma-informed care through the lens of the person-centered principles.



Center on Aging, Trauma, and Holocaust Survivor Care, 2024

PCTI Principles

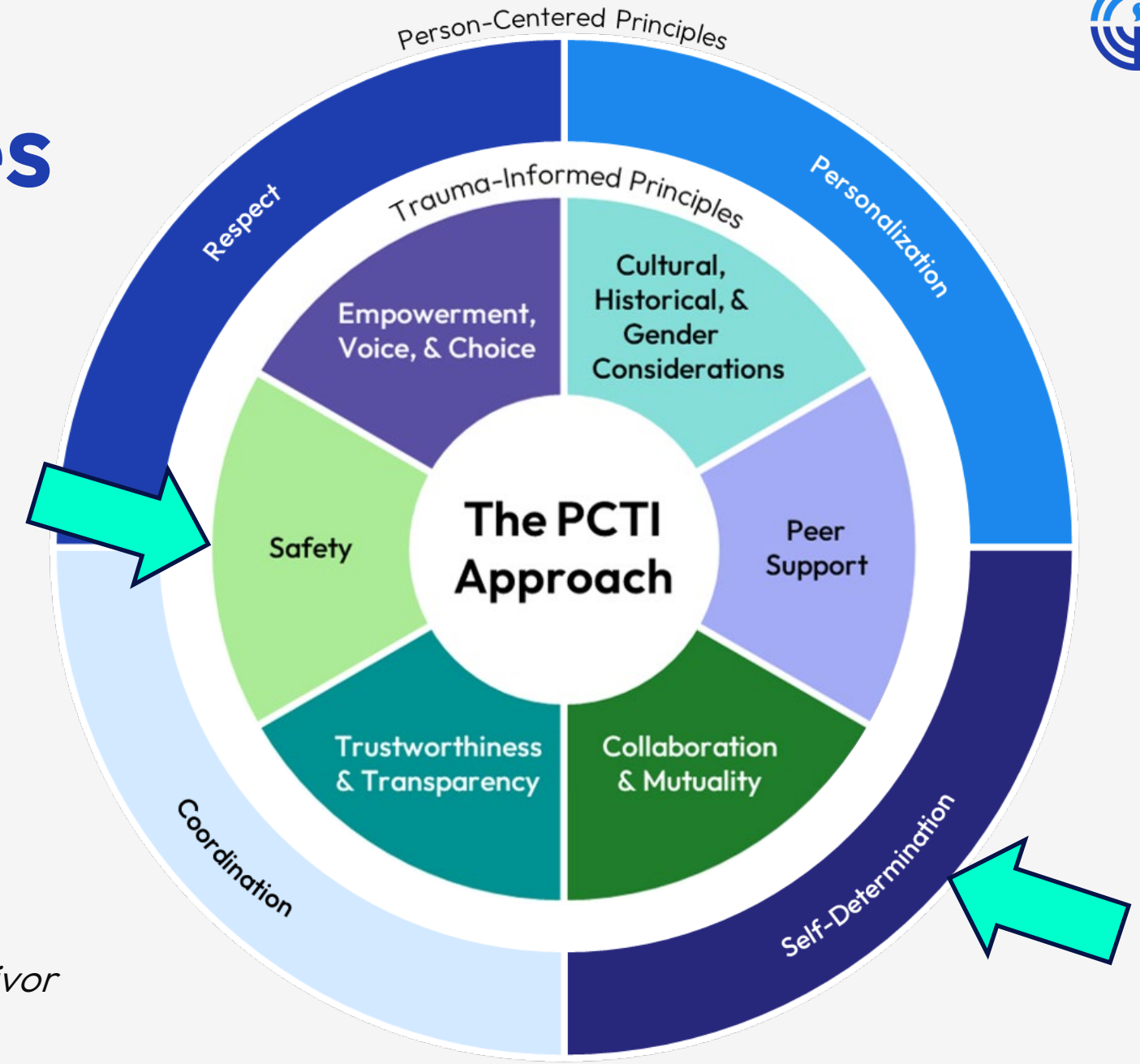
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Center on Aging, Trauma, and Holocaust Survivor Care, 2024

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Strategies for Implementing the PCTI Approach

Direct Service

Safety

Trustworthiness & Transparency

Peer Support

Collaboration & Mutuality

Empowerment, Voice, & Choice

Cultural, Historical, & Gender Considerations

Safety

Direct Service

- Ensure that physical space is **well-lit** inside and outside, such as in parking areas
- Ensure signage is legible with **large, bold fonts**
- Provide adequate seating and **space between seats**
- Place **check-in calls** following a community crisis, enlist volunteers to assist
- Provide **empathetic listening** without judgment
- Offer to **meet in the client's home** when possible, if it is safer for the client
- Ask for **consent before physically touching anyone**, whether a supportive hug or medical procedure
- **Demonstrate understanding** when clients display emotional or behavioral trauma symptoms
- **Smile**, model respectful behavior with other staff and volunteers

Trustworthiness & Transparency

Direct Service

- Introduce yourself, **explain** your role, the purpose of your meeting, what to expect, and next steps
- Check for **understanding** and inform client that they can ask questions or take breaks at any time
- During intake or evaluations**, explain why** personal information is being collected, how it will be used or shared, and how privacy will be protected
- **Communicate if you will arrive late** or appointments are running behind, even if it's only 5 minutes
- Demonstrate **patience and understanding** when clients hesitate to use services
- Provide a **client newsletter** with organizational updates
- Provide clients with a **point-of-contact** who they can reach out to for information and assistance
- Provide clients with **time to gain comfort** with providers prior to asking personal questions or performing invasive procedures

Peer Support

Direct Service

- At social events and support groups, **introduce clients** to each other, offer nametags
- **Enlist clients** to assist with outreach to new prospective clients
- Place **reminder calls** to individual clients before events, utilize volunteers to help place calls
- Consider programs to provide **socialization** for clients: intergenerational, friendly visitor volunteers
- Post resources and materials that **acknowledge caregivers, and allow them** to accompany clients
- **Encourage clients to share** their challenges and solutions with one another

Collaboration & Mutuality

Direct Service

- Provide opportunities for **clients to inform the design** of physical and virtual spaces
- Ask clients **how they prefer** to answer questions
- **Follow up with clients** one-on-one on how their experience has been going
- Communicate to clients **how feedback was integrated** into programming
- Acknowledge that **staff at all levels** shape a client's experience
- Provide **PCTI training** to frontline staff and volunteers tailored to their roles
- **Train partners** and vendors, build a PCTI referral network or collaborative to avoid re-traumatization

Empowerment, Voice, & Choice

Direct Service

- Respect clients' **self-determination**, even if we would make different choices
- Ensure clients know **they can opt out** of services at any time with no penalty
- **Encourage clients** to take an active role in their care plans
- Actively listen to clients and **give their experiences a direct role** in shaping services and programs
- Ensure that all **clients are informed** of the services for which they are eligible
- Educate clients on **symptoms of trauma** exposure
- If a service or procedure is required, **explain why** it is required
- **Avoid rigid and inflexible** schedules or procedures for clients
- **Thank clients** for meeting with you and for their time

Cultural, Historical, & Gender Considerations

Direct Service

- Ensure that **frontline staff are trained** on the unique needs and histories of the populations served
- Understand that cultural, ethnic, religious, and other minoritized **communities are not homogenous**
- Provide services in the **preferred language** and culture of clients
- Use visuals to demonstrate a welcoming space for **clients of all backgrounds**
- Adapt services to meet the **unique needs of individual** clients, whenever possible
- Provide **culturally appropriate food** for services, procedures, and events
- Ex: Serve **plated meals** rather than having clients wait in line, have takeout containers available



Case Study

“I had the honor and privilege of delivering the JFNA Life Lessons book to my clients Roman and Laura Breitberg. Roman is on hospice and was extremely touched that we presented him with a copy of the book before the other copies were ready for distribution – this is actually the proof version.

He said this project allowed him to reflect upon his life and that he was **honoring his family** who suffered during the war. He never really considered himself a survivor until this project. His wife Laura expressed her eagerness to share this book with JFS of Kansas City where she worked for many years after immigrating to America. She referred to it a full circle moment. I could also see the sentiment in Laura’s eyes as she watched her husband comb through the pages of their book. They were in awe of the book. It was a beautiful day.”

Margarita Ferdman, Care Manager

Organization

Safety

Trustworthiness & Transparency

Peer Support

Collaboration & Mutuality

Empowerment, Voice, & Choice

Cultural, Historical, & Gender Considerations

Safety

Organization

- Encourage honest feedback demonstrating that there is **no retaliation**
- Set **ground rules at meetings** about listening respectfully, not interrupting, etc. and uphold them
- Ensure that physical space is **well-lit** inside and outside, such as in parking areas
- Provide adequate seating and **space between seats** during meetings and events
- Allow staff to **choose where they sit** at meetings and events
- Provide **content warnings** when preparing to discuss difficult subject matters
- Encourage staff to **take breaks** and tend to their physical needs

Trustworthiness & Transparency

Organization

- Employees and leaders **follow through** on commitments and take **accountability**
- Establish a culture of **transparent communication** between staff and their supervisors
- Supervisors give **credit to employees** for their ideas and contributions
- Employee **accomplishments are recognized** by leaders
- Provide **active listening** and be open to self-reflection
- **Leadership communicates** organizational and department goals and plans clearly
- Meeting and event **agendas are shared** in advance

Peer Support

Organization

- Convene **staff gatherings to debrief** about difficult situations and to celebrate successes
- Establish **employee resource groups** (ERGs) and provide them with adequate support
- Create employee **mentorship programs** or assign new hire partners
- **Respect** employees' and coworkers' **boundaries**

Collaboration & Mutuality

Organization

- Encourage **input from staff and volunteers of all levels** when developing and modifying programs
- Acknowledge that **frontline and direct service staff** have the most accurate knowledge of logistics
- Leadership displays **accountability and candor** regarding their own areas of improvement
- Provide opportunities to **receive employee feedback**, and be prepared to act on the results
- **Solicit staff contributions** to meeting agendas in advance
- Provide **PCTI training** to staff and volunteers at all levels of the organization

Empowerment, Voice, & Choice

Organization

- Create opportunities for staff and volunteers to utilize their **individual strengths and skills**
- Ask employees how they **prefer to be recognized**, and note that there is no one size fits all
- Work with employees to set goals that are **realistic and achievable**
- Provide an **adequate training** experience with the tools employees need to be successful
- Ensure **dietary needs** are accounted for when planning catering for meetings or events
- Ensure you have obtained **consent before sharing photos** of employees on social media, press releases, literature, and your website
- When scheduling meetings or interviews, provide **multiple date and time options**

Cultural, Historical, & Gender Considerations

Organization

- Confirm that major events do not overlap with **religious holidays**, especially fasting holidays
- Recruit staff and volunteers who **match the population** being served
- Use visuals to demonstrate a welcoming space for **staff of all backgrounds**
- **Publicize statements** on the organization's support of various marginalized groups
- Encourage use of **gender pronouns** in signature lines, name badges, Zoom meetings, bios, etc.
- Ensure marketing and communication materials use language and visuals **representative of the population** you serve
- Ensure decorations in the organization are **representative of diverse cultures**
- **Engage underserved communities** in the design of programming and Diversity, Equity, and Inclusion initiatives



Deborah Grayson Riegel MSW, PCC
Speak Easy

TRAUMA

Your Meetings Need to Be Trauma-Informed

Put physical safety, psychological well-being, and empowerment on your agenda

Posted May 15, 2024 | Reviewed by Davia Sills

THE BASICS

What Is Trauma?

Find counselling to heal from trauma

KEY POINTS

- **Up to 90 percent of Americans will have experienced a traumatic event by the time they reach 65.**
- **Meetings need to be trauma-informed to achieve their goals without inadvertently causing re-harm.**
- **Meetings should prioritize physical safety, psychological well-being, and participant empowerment.**



This post was co-authored by Shelley Rood Wernick, MBA, Managing Director of the Jewish Federations' Center on Holocaust Survivor Care and Institute on Aging and Trauma.

Policies & Procedures

Safety

Trustworthiness & Transparency

Peer Support

Collaboration & Mutuality

Empowerment, Voice, & Choice

Cultural, Historical, & Gender Considerations

Safety

Policies & Procedures

- Create and define clear **policies for addressing bullying and harassment**
- Provide **antibullying and antiharassment training** to staff at all levels
- Ensure safe and confidential avenues for reporting discrimination or harassment **without retaliation**
- Do everything possible to **protect employee confidentiality** when investigating incidents
- **Practice emergency drills**, ensure adequate signage and supplies are accessible
- Ensure that emergency drills **accommodate individuals** with mobility limitations
- **Enforce security measures**, such as not propping doors to locked buildings
- Adapt and evolve emergency preparedness policies in **response to emerging threats**

Trustworthiness & Transparency

Policies & Procedures

- Make policies **easily accessible** to employees in terms of location and wording
- **Explain** to staff and volunteers the purpose and rationale behind policy changes
- Ensure **availability of leadership or Human Resources** support to answer employee questions
- Make position descriptions as comprehensive as possible, with **clear rationale** for how duties relate to the position
- Ensure space in meeting agendas for **questions and answers**
- Incorporate **PCTI 101 training** into onboarding and ongoing training

Peer Support

Policies & Procedures

- Structure new employee onboarding to include **introductions to staff** and time to foster connections
- Build **check-in and reporting out** time into team meetings at the beginning of the agenda
- Incorporate **processing time** into workloads
- Provide employees with access to **assistance programs** and other supportive services

Collaboration & Mutuality

Policies & Procedures

- **Elicit input** in shaping policies and procedures from **employees at all levels**
- Ensure that **policies are enforced equally** across staff levels and positions

Empowerment, Voice, & Choice

Policies & Procedures

- **Provide flexibility** whenever possible for employee schedules and work locations
- Create space in position descriptions for individual **employee strengths to shine**
- **Welcome questions and feedback** on policies and procedures, and be open to making changes when possible
- When a controversial policy cannot be changed, **provide a clear rationale**

Cultural, Historical, & Gender Considerations

Policies & Procedures

- Ensure that **anti-harassment and anti-discrimination policies are upheld** and that staff reports are taken seriously
- Provide adequate **time off for holidays** from different religions
- Ensure that dress code policies are gender neutral and **accommodate** religious attire
- Provide opportunities for organizational leadership, staff, and volunteers to **improve cultural humility and competence**
- Provide opportunities for staff and volunteers to **reflect on their own cultural backgrounds**, values, beliefs, assumptions, **and biases**

Leadership Involvement

Overview of PCTI Leadership

"The manner in which we support each other in times of crisis will reverberate in our organizations for many years to come." - Manning, 2022

“Trauma-informed workplaces offer a sanctuary of safety and support, a place where people can bring their whole selves and be valued for who they are." Sandra L. Bloom, M.D., CTIPP

"Administrators must promote rather than simply announce the implementation of trauma-informed services." SAMHSA, 2014

“It requires a significant shift in mindset and a commitment to prioritizing the well-being of employees. It may also involve overcoming resistance to change and addressing systemic issues within the organization.” - Atwood, 2023

Working Toward PCTI Leadership

Leadership should create an environment that fosters:

- Acknowledgement (“I will be heard”)
- Support (“I can get the help I need”)
- Trust (“I will be treated fairly”)

- ✓ Power-sharing vs. Power-hoarding
- ✓ Consistent, Clear Communication
- ✓ Trust & Transparency
- ✓ Inclusion through Lived Experience & Shared Decision-Making

Operationalizing PCTI Leadership

- Understanding, infusion, and modeling of agency's mission, values, and vision
- Universal PCTI language
- Advisory council
- Agency self-assessment
- **Staff support:**
  - Investment
  - Supervision
  - Training & Education
  - Resources

Questions?

Next Steps

- View our resources at AgingAndTrauma.org
- Participate in our Training Workshop in Washington, DC summer/2025
- Connect with service providers in your area who are leaders in PCTI
- Discuss our PCTI Backgrounder at a staff meeting
- Consider: How will you infuse the PCTI approach into your work?

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Thank You!