CALTRIN
California Training Institute

Becoming a Trauma-Informed Leader: Preparing for and Implementing Change at the Personal and Team Levels

Presented by Lisa Conradi, PsyD

1

Before We Begin...

DURING

The notetaking slides and participant guide are in the chat now!

Review interactive features for today's session. Locate the controls on the toolbar at the bottom of your screen.

This presentation is being recorded for administrative purposes only. The recording will NOT be shared.

External AI assistants are not allowed in CalTrin trainings due to California privacy laws.

AFTER

Complete the survey at the end of part three to receive your Certificate of Attendance.

A follow-up email will be sent to all participants. To receive credit for this training and to be sent the materials, **you must be using your OWN Zoom link**.

2

TRAINING RESOURCES

Workbook Page # x

CALTRIN

Becoming a Trauma-Informed Leader:
Preparing for and Implementing Change at the Personal and Team Levels

Participant Guide

Fillable PDF Participant Guide

Notetaking PPT Slides

3

BECOMING A TRAUMA-INFORMED LEADER:

PREPARING AND IMPLEMENTING CHANGE AT THE PERSONAL AND TEAM LEVELS

Lisa Conradi, Psy.D.
President and Founder
Trauma-Informed Innovations, LLC

March 11, March 25, and April 8 - 2025

4

PLAN FOR THIS SERIES

At the end of this 3-part series, participants will be able to:

- Identify concrete strategies that participants can use to personally prepare to become trauma-informed leaders.
- Identify concrete strategies to assist in building safety and trust in their teams.
- Assess and identify key boundaries that they can implement at the personal and team levels to support them in building safety and trust in their teams.
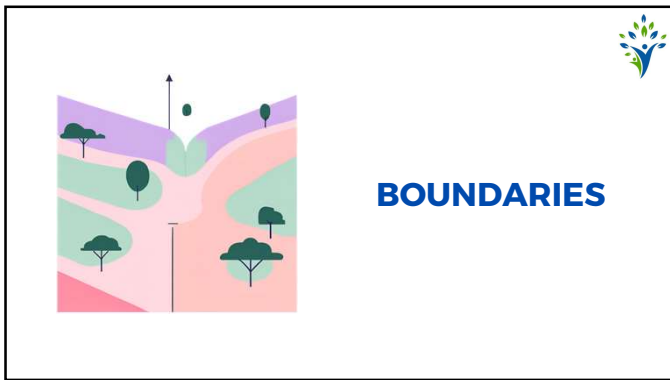
5

CHECK-IN FROM OUR LAST SESSION

- Review your self-reflection action items from our last session
- Were there any that you were able to implement? If so, what worked? What was challenging?
- Based on your experience, is there anything you'd like to do differently in the future?
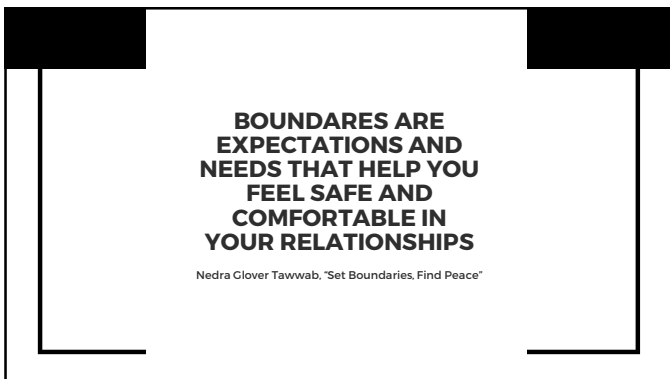
6

TRAUMA-INFORMED LEADERSHIP: DEVELOPING AND MAINTAINING PERSONAL AND PROFESSIONAL BOUNDARIES

April 8, 2025

7

BOUNDARIES

8

BOUNDARES ARE EXPECTATIONS AND NEEDS THAT HELP YOU FEEL SAFE AND COMFORTABLE IN YOUR RELATIONSHIPS

Nedra Glover Tawwab, "Set Boundaries, Find Peace"

9

BOUNDARIES

- Individuals who have experienced trauma have often had their physical and emotional boundaries fundamentally violated, often repeatedly.
- Often, we loosen our boundaries trying to be "compassionate" or "available" to our staff or we keep overly rigid boundaries that may not make much sense.
- Finding a balance of appropriate, healthy, and relational boundaries is critical as a trauma-informed leader.

10

Common Staff or Team Boundary Violations in the Workplace

- Inappropriate Personal Conversations
- Physical Boundaries
- Excessive Socializing or Over-friendliness
- Inappropriate Communication
- Conflict of Interest

11

Common Staff or Team Boundary Violations in the Workplace, Continued

- Ignoring Professional Hierarchies
- Gossiping or Spreading Rumors
- Taking on Tasks Outside of Job Description
- Excessive Hours
- Always Being Available

12

Common Leader Boundary Violations in the Workplace

- Favoritism or Unequal Treatment
- Abusing Power or Authority
- Excessive Hours
- Always Being Available
- Inappropriate Communication
- Blurred Professional and Personal Lines

13

Common Leader Boundary Violations in the Workplace, continued

- Excessive Socializing or Overstepping
- Unethical or Unclear Expectations
- Creating or Tolerating a Toxic Work Culture
- Sexual Harassment or Inappropriate Comments
- Conflict of Interest
- Unclear Boundaries in Supervision

14

Breakout Room Discussions

12

As you reflect on some of the common team and leader boundary violations that occur in the workplace, discuss the following questions in your breakout groups:

- Introduce yourselves – name, agency, role, years in leadership
- What are some common staff or team boundary violations that you see in your work?
- What are some common leader boundary violations that you see in your work?
- How do you think that these types of boundary violations have impacted your work environment?
- Brief Report out to the larger group

15

Boundaries and the Workplace
A lack of boundaries in the workplace can lead to:

- Burnout and Stress

- Decreased Productivity

- Conflicts and Resentment

- Increased Turnover and Absenteeism

- Poor Work-Life Balance

16

Boundaries and the Workplace
A lack of boundaries in the workplace can lead to (continued):

- Unclear Roles and Expectations

- Toxic Work Culture

- Loss of Respect for Authority

- Legal and Ethical Risks

17

13

PERSONAL BOUNDARIES ASSESSMENT

JOURNAL YOUR RESPONSES TO THE FOLLOWING QUESTIONS:

- Do I feel comfortable and safe in my interactions with others, both personally and professionally?
- Am I saying "yes" to things out of fear of conflict or disappointing others, rather than because I truly want to?
- Do I make time for my own needs, hobbies, and rest, or do I often prioritize others at the expense of my well-being?
- When someone oversteps, do I assert myself and express my discomfort, or do I let it slide?
- Do I have clear limits with others when it comes to my personal space, time, and energy, or do I let others dictate the terms?
- Am I respecting the boundaries of others, or do I unintentionally violate them by being too intrusive or demanding?
- How do I feel after social events, meetings, or interactions? Energized and fulfilled, or drained and overwhelmed?

18

14

PERSONAL BOUNDARIES ASSESSMENT, CONTINUED

JOURNAL YOUR RESPONSES TO THE FOLLOWING QUESTIONS:

- **Work hours:** Do you arrive at work on time and leave at a reasonable hour? Or do you regularly stay late, or come in early?

- **Availability:** How often do you check and respond to emails after work hours or on weekends? Do you feel like you're expected to be available all the time, even if your job doesn't require it?

- **Time off:** When was the last time you took a full vacation? Did you fully disconnect from work, or did you stay "on call"? How often do you take sick days, and when you do, do you still work?

- **Job responsibilities:** Do you have a clear sense of your job scope? Do you often take on tasks that are outside your responsibilities to help your team, even when it's not necessary?

- **Areas of tension:** Are there parts of your job that frustrate you, or leave you feeling drained? These areas often signal where boundaries need to be established.

19

15

Breakout Room Discussions

We will now go back into the same breakout groups that we had before and discuss the following:

- What are some things that you learned about yourself and the kinds of boundaries that you may or may not have?
- What are some areas in which you feel you are strong at keeping boundaries?
- What are some areas that provide opportunities for growth?

We'll report back out to the larger group.

20

How to Set Personal and Professional Boundaries as a Trauma-Informed Leader

- **Set Clear Expectations from the Start**

- **Model Healthy Boundaries**

- **Prioritize Self-Care and Time Management**

- **Learn to Say "No" or "Not Right Now"**

- **Delegate Effectively**

- **Practice Consistent and Respectful Communication**

- **Create a Structured Routine**

21

Self-Reflection Activity

16

What are at least three strategies that you can try with your team in the next two weeks?

22

The Importance of Setting Boundaries for Your Team

- Promotes a Healthy Work-Life Balance
- Encourages Respect and Professionalism
- Enhances Focus and Productivity
- Prevents Burnout and Overwork

23

The Importance of Setting Boundaries for Your Team, continued

- Improves Communication and Clarity
- Fosters Accountability and Empowerment
- Builds Trust and Respect

24

TEAM BOUNDARIES ASSESSMENT

JOURNAL YOUR RESPONSES TO THE FOLLOWING QUESTIONS:

- Do team members communicate openly and respectfully when they feel overwhelmed or need support?
- Do team members respect each other's time, both in and outside of work hours?
- Are there clear expectations about roles and responsibilities, and do employees feel empowered to say "no" when necessary?
- Are team members able to balance collaboration with independence, without being overly reliant on or dependent on each other?
- Do team members speak up when someone crosses a professional line, such as overstepping their responsibilities or invading personal space?
- Is there a culture of respect for personal space, privacy, and individual work styles?
- How do team members handle disagreements or conflicts? Do they maintain professionalism or let personal emotions interfere with work?

17

25

Breakout Room Discussions

18

We will now go back into the same breakout groups that we had before and discuss the following:

- What are some things that you learned about your team and the kinds of boundaries that they may or may not have with each other?
- What are some areas in which you feel your team is strong at keeping boundaries?
- What are some areas that provide opportunities for growth?

We'll report back out to the larger group.

26

How Trauma-Informed Leaders Can Create a Culture of Boundaries

- **Have an Open Conversation About Boundaries**

- **Set Group Norms and Guidelines**

- **Lead by example**

- **Review job descriptions and workloads**

27

How Trauma-Informed Leaders Can Create a Culture of Boundaries, Continued

- Close the gaps

- Create sustainable workload practices

- Support Staff who tend to go above and beyond

28

Self-Reflection Activity

What are at least three strategies that you can try with your team in the next two weeks?

19

29

BRINGING IT ALL TOGETHER

30

GENERAL TIPS ON LEADING WITH COMPASSION AND ACCOUNTABILITY

- Don't be afraid to create clear boundaries and expectations for job roles and performance
- Engage in courageous and difficult conversations on an ongoing basis
- Create an environment that views mistakes as opportunities to learn (but still hold people accountable to appropriate consequences)
- Create opportunities for staff to connect with one another and appreciate each other as human beings
- Provide ongoing and transparent communication regarding initiatives and expectations
- Focus efforts for improvement in your zones of control and influence
- Be aware of your own triggers and trauma and how it may be impacting your ability to fully engage

31

Action Planning Activity

20

In reflecting on our last six weeks of work together, take a moment to journal your responses to the following questions. We will invite a couple of participants to share their action plans with the group:
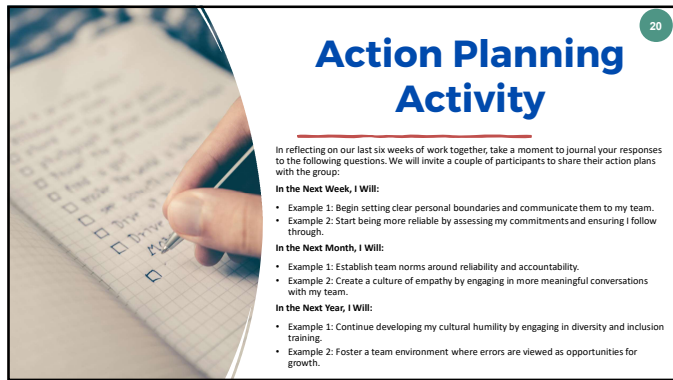
In the Next Week, I Will:

- Example 1: Begin setting clear personal boundaries and communicate them to my team.
- Example 2: Start being more reliable by assessing my commitments and ensuring I follow through.

In the Next Month, I Will:

- Example 1: Establish team norms around reliability and accountability.
- Example 2: Create a culture of empathy by engaging in more meaningful conversations with my team.

In the Next Year, I Will:

- Example 1: Continue developing my cultural humility by engaging in diversity and inclusion training.
- Example 2: Foster a team environment where errors are viewed as opportunities for growth.

32

QUESTIONS AND DISCUSSION

33

RESOURCES

SET BOUNDARIES, FIND PEACE
a guide to reclaiming yourself
NEDRA GLOVER TAWWAB

Inclusion on Purpose
An Intersectional Approach to Creating a Culture of Belonging at Work
Ruchika Tulshyan

THE ART OF GATHERING
HOW WE MEET AND WHY IT MATTERS
PRIYA PARKER

Brené Brown
dare to lead

the fearless organization
Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth
Amy C. Edmondson
WILEY

GABOR MATÉ, M.D. with DANIEL MATÉ
the Myth of Normal
TRAUMA, ILLNESS, & HEALING IN A TOXIC CULTURE

34

ABOUT TRAUMA-INFORMED INNOVATIONS

We help leaders use a trauma-informed leadership approach to overcome self-doubt, set strong boundaries, and navigate challenging leadership situations with confidence and ease.

We provide training and consultation, individual and group coaching, and professional speaking to help new and emerging leaders grow their skills to become more confident, clear, and compassionate.

35

LISA CONRADI
Trauma-Informed Innovations, LLC

LET'S CONNECT!

✉ lmc@lisaconradi.com

🌐 www.lisaconradi.com

in www.linkedin.com/in/lisa-conradi-27996b31

36

37

38