Developing a Trauma Sensitive Project Management Framework
Author: David Scheer
08/11/2020

Problem: Often, during high visibility, complex, high stakes projects, Project Team members encounter times of high stress that can overwhelm their ability to cope with the challenges they face. At times, these moments are due to personal situations, but may also be due to the project or work environment itself. Either way, such times can elicit emotional trauma and result in poor organizational performance and dysfunction and on a personal level, can create significant life changes carrying negative consequences.

Solution: The Trauma Sensitive Project Management Framework is an approach to formal Project Management that can be applied in organizations that experience these problems. The framework explicitly implements systemic (large or small) changes that are founded in recognizing the importance and value of the affective domain.

Three strategies that can be utilized during an implementation of the framework:

1 – Formally Identify a Project as a "Trauma Sensitive Project"
Establish assumptions with the Project Sponsor, Project Stakeholders and the Project Team that the project being initiated will be a *Trauma Sensitive Project* and that appropriate protocols and processes have been established. This includes safe forums where each person's affective state can be communicated and addressed as a project team (confidential items will be referred to HR).

2 – Create Training Collateral and Other Materials
Create these materials with the purpose of educating team members and the overall organization about the Trauma Sensitive Project Management approach. To better socialize this new approach, it will be important to increase credibility and create a link between previous knowledge about how projects are run and this new "Trauma Sensitive Layer" that can be applied to projects going forward.

3 – Initiate Advocacy: Share the approach and lessons learned to a wider audience.
Depending on the size of the organization, this can include other project managers, the Project Management Office (PMO), the Customer, the Operations Team, or the organization as a whole. The Project Manager and other team members can serve in advocacy positions to enhance the relevant culture with Trauma Sensitive practices, communicating the benefits that have been realized through implementation of the approach.

A - Who would benefit?
Benefits of this framework apply to:
- Project Sponsors – those who authorize and fund projects would benefit from increased effectiveness in leading in the affective domain.

- Project Customers – those who are the receivers of project work product would experience the benefits of an effective, high-performing project team that can better execute projects toward business goals.
- Project Team Members – those who perform the work of the project benefit through increased feelings of safety, trust, honesty and work quality, increasing the likelihood that they experience both meaningful work and professional growth.

<u>B - Potential costs</u>
The Direct Costs of implementing this framework would be minimal. Other than perhaps a small amount of documentation, almost no procurement would be required. Indirect costs would include staff and leadership time required to educate and socialize the new approach. Depending on the adoption strategy of an organization or Project Management Office (PMO) for the implementation, the cost could stay as close to zero as possible or become a line item in standard PMO budget.

<u>C - Brief Step-by-Step Implementation Plan</u>
1. Create documentation and content that outlines what a Trauma Sensitive Project means, what processes, protocols, procedures, and assumptions are in place. This includes a formal agreement by the project sponsor that they concur and fully support this approach to project initiation, planning, execution, and closure.

2. During the Project Initiation and Planning stages – introduce and socialize the concept and framework with Project Sponsors, obtaining executive alignment and buy-in.

3. During Project Kickoff Stage – introduce and socialize the concept and framework with team members, stakeholders, and vendors.

4. During Execution, as the team moves through the storming, norming and performing stages of team development, the Trauma Sensitive approach becomes the framework that can be used to address risks (those aspects of the project that could happen) and issues (those aspects that have happened) from both an effective an affective perspective.

5. Facilitate any appropriate discussions that arise and follow established protocols. Refer those who need more specialized assistance to appropriate resources. Address privacy and confidentiality concerns if any arise. Examples of protocols would include:

   a. Create a cooldown protocol for all project team members as a safe forum to recognize and identify their own affective responses to project events and activities.
   b. Enhance meeting agendas with standard beginning, middle, and ending items that focus on the affective domain and appropriately screen for trauma events and practices.
   c. Enlist an HR Partner who is an ally to ensure formal organizational procedures are aware of this framework. Leverage their expertise to provide resources and guidance.

6. Perform an after-action review during project closure. Evaluate performance and what went well and what did not. Feed this information back to various groups and make appropriate enhancements or adjustments to policies and protocols for the next project.

D - Potential Barriers to Implementation
Possible barriers to Trauma Sensitive Project Management include:

- A top-down organizational culture that stifles innovation and supports the status quo.
- Pressure on the PMO caused by time constraints ('too much on the plate'), resource constraints ('just need to get stuff done, we don't have resources to implement that'), and scope constraints ('there is just too much right now, don't make it bigger').
- Entrenched knowledge, attitudes, or beliefs about the low-value, high effort character of "new" approaches.
- A culture that de-values the affective domain.
- Organizational focus on quarterly reporting to shareholders (if a public company) which cannot draw a connection between new methods and monetary improvement.

E - Anticipated Frequency of Use?
Because this framework applies to projects, which, by definition, have a start date and an end date, the framework would be re-started during the either the initiation phase or the execution phase of the project, depending on its size and scope.

F - Will You Need Administrative Approval to Use the Resource?
The focus of the implementation approval would be on the formal Sponsor of the project. As the person(s) who authorizes and funds a given project, their approval may or may not be required depending on how a Project Manager chooses to execute the framework. Either way, it would be important for the Project Manager to communicate to a Sponsor that this project is being run from a Trauma Sensitive perspective.

G - Describe the Scenario in Which You Would Use Each of the Resources Listed Above
The scenario/use case for this resource is at the beginning of each project, the Trauma Sensitive Project Management Framework would be introduced, described, and established for the duration of the project. Individuals who encounter either personal or professional trauma during the course of the project are those that would feel overwhelmed, fearful, or experience other feelings of an unsafe or toxic work environment. In addition, individuals who are in a state of personal trauma would likely exhibit atypical behavior, showing signs of irritability, listlessness, absenteeism, stress, or resentment. Generally speaking, the Trauma Sensitive practices in this context would occur during regularly established project meetings. Such cadences are the norm for almost all formal projects.

H - Anticipated Outcomes/Expectations for Using this Strategy

Anticipated outcomes of Formally Identifying a Project as a 'Trauma Sensitive Project':
- Establishes buy-in and ground rules ahead of time for executives and other leadership to recognize the importance of the affective domain in effective performance.
- Provides a project-level safety zone for project team members to confront one another (including executives) when circumstances or behavior trip trauma triggers for an individual.
- Decreases the likelihood of actions being performed due to fear or submission and increases the likelihood of activities being performed through empowered honesty.
- Provides a forum for executives to receive 'brutally honest' feedback and updates about the status of projects, programs, and human capital resources.
- Normalizes failure and implements a positive feedback and reward system for communicating truth.
- Builds trust in the team at a deeper level enabling higher efficiency and effectiveness in future projects delivery.
- The organization spends less time and money on trying to solve problems that are unclear or obfuscated and enables a focus on what matters.
- Communicates, and delivers in practical measures, that people truly are the organizations most important asset.

Summary

The purpose of the Trauma Sensitive Project Management Framework approach is to make things better during project delivery. By its very nature, project management and project delivery are in the business of being a catalyst for change – an endeavor that sometimes almost seems to demand conflict, pain, harsh reality and massive constraints. Regardless of the conceptual demands, at the end of the day, project work is performed by people, and in reality, people live in both effective and affective domains.

Today's corporate environments, especially large ones, expect project performance divorced from an awareness and integration of individuals' affective states. This is both short-sighted and is contrary to psychological and educational research.

I submit that this approach to corporate projects, or indeed any endeavor that musters resources to complete a scope of work in a finite amount of time, can increase the effectiveness and efficiency of that execution. This approach executes while feeding the affective needs of the people who are involved, protecting them from burnout, and ensuring that they can be energized and ready to help tackle the next challenge.

David Scheer
August 11, 2020