

The logo for 'meus' is centered within a series of four concentric circles. The circles are light gray and have varying line thicknesses. The word 'meus' is written in a lowercase, sans-serif font inside the innermost circle.

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WHITE PAPER

# **a framework for working with organisational trauma**



## WHITEPAPER - A FRAMEWORK FOR WORKING WITH ORGANISATIONAL TRAUMA

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## CONTENTS

1. Introduction	-	Page 4
2. Executive Summary	-	Page 6
3. The Case for Organisational Trauma	-	Page 7
4. Diagnosing Organisational Trauma	-	Page 8
5. Dealing with Organisational Trauma: Our Practice Framework	-	Page 11
6. Conclusion	-	Page 16
7. Case Studies	-	Page 18
8. References	-	Page 26
9. Further Reading	-	Page 27
10. Appendices	-	Page 28
i. Definitions of Trauma		
ii. About the Authors and Meus		

# 1 INTRODUCTION

## WHY FOCUS ON ORGANISATIONAL TRAUMA?

Trauma-informed work in organisations represents an emerging field of practice exploring complex sets of issues and experiences that, until relatively recently, have remained largely unarticulated and therefore, at their core, hidden from view. Yet as Vivian and Hormann<sup>1</sup> point out,

*"Unaddressed organizational trauma – whether sudden or cumulative – causes serious harm and can be catastrophic for organizations. It negatively impacts service delivery, compromises work with clients, and weakens the organization's ability to respond to internal and external challenges. Over time the unhealed effects of trauma and traumatization compromise the organization's fundamental health."*

While much is known in the psychotherapeutic literature about working with traumatised *individuals*, the question of whether a *whole organisation* can be traumatised has been largely ignored. Over the last decade, a growing number of authors have begun to focus on this form of collective trauma. Each, from their own distinctive theoretical and practice perspectives, have tended to highlight different aspects of organisational trauma and offer different ways in which it can be dealt with.

This White Paper builds on existing research, methods and practices, and synthesises these rich and varied threads, to enable leaders and practitioners to diagnose and deal with organisational trauma effectively. We offer you a meta-framework that we are currently exploring and applying in our own Organisational Development (OD) practice, and which can help you to notice, understand, investigate and work constructively with organisational trauma, as much as is practically possible in your specific context.

## WHAT DO WE MEAN BY 'ORGANISATIONAL TRAUMA'?

Organisational trauma may be recognised by a constellation of symptoms that compromise the resilience, agility and everyday functioning of an organisation. It is characterised by broken connections between individuals in that organisation; between parts of the organisation; and between the organisation, its stakeholders and wider society. It may be caused either by a single event or series of events, or by persistent toxic conditions that overwhelm the organisation's ability to cope. It may also arise from the cumulative effect of an organisation's work, where that work regularly exposes employees to human suffering.

## WHO IS THIS WHITE PAPER FOR?

Written against the context of a global pandemic, environmental crisis, and unprecedented social upheaval (evidenced by the war in Ukraine, Brexit, civil rights movements including Black Lives Matter, #metoo and trans rights among other current issues) organisational leaders, managers and teams are experiencing challenges that require new approaches and adaptive responses.

*"Organisational trauma may be caused either by a single event or series of events, or by persistent toxic conditions that overwhelm the organisation's ability to cope."*

PAT VIVIAN

This disruptive social context is stimulating thinking about collective trauma, which is beginning to influence the ways Organisational Development specialists approach change management, leadership and team development, coaching, facilitation, Diversity, Equity & Inclusion practices and other specialisms.

This White Paper is a guide for all organisational leaders, coaches and consultants interested in understanding Organisational Trauma and its impact on cultural transformation – and for leveraging this understanding to improve cultural wellbeing and organisational agility. The implications of Organisational Trauma will also make this White Paper of interest to Human Resources professionals and policy makers at the most senior levels.

## WHAT IS THE SCOPE OF THIS WHITE PAPER?

Many individuals at work are traumatised, and many by work-related issues. While we fully acknowledge the crucial importance of working skilfully with individuals in organisations that have been traumatised, it is not our intention in this White Paper to describe how to work at an individual level. This is an area where specific training for managers, coaches and consultants is warranted, and where organisational practitioners still have much to learn from our psychotherapeutic colleagues as well as from the vast literature on recovering from post-traumatic stress. Within this White Paper we restrict the scope of our attention to working at the collective level – of the team, function or whole organisation.

## 2 EXECUTIVE SUMMARY

This White Paper draws on current research and practice into organisational trauma that will help leaders and OD professionals to understand, diagnose and deal with organisational trauma effectively. We also present a unique framework that builds on current thinking and is grounded in our own action research as well as direct experience from our professional practice.

The authors of this White Paper are consultants, coaches and managers working with leading-edge, creative approaches across corporate and public sectors. We draw on our own extensive experience of working with organisational trauma from different vantage points. To further inform our work, we have reviewed selected literature on organisational trauma and interviewed organisational leaders and OD professionals over the past five years. The result, presented here, is an overview of the emerging field of organisational trauma theory and practice which we hope will guide anyone interested in tackling this business-critical subject effectively.

*"Post-traumatic growth, and potentially post-traumatic transformation are possible."*

In this White Paper we also point to the possibility – if sensitively worked with over time – of post-traumatic growth, and potentially post-traumatic transformation.

This White Paper is a practical guide that provides:

- A working definition and typology of organisational trauma grounded in selected literature.
- A structure for diagnosing organisational trauma that illustrates: signs and symptoms, points of origin, and factors that exacerbate as well as mitigate organisational trauma.
- A framework for dealing with organisational trauma that might prove useful for organisations seeking to implement relevant OD practices.
- Case Studies that describe how organisational trauma presented and was engaged with in different organisational contexts.
- Appendices that provide further information on the authors and their special interests and backgrounds.

At the heart of this White Paper, we share a structure for diagnosing organisational trauma and a framework for dealing with organisational trauma. These elements bring the possibility that trauma is at the heart of present organisational difficulties into the consciousness of leaders and the organisational coaches and consultants who support them. Importantly, our synthesis of ways to diagnose and deal with organisational trauma brings a fresh lens with which to view the situation and greater clarity as to the most appropriate level of the system at which to intervene – and ultimately, which interventions are most likely to restore flow in the organisational culture and release the energy that is cut off or stuck somewhere<sup>2</sup>.

### 3 THE CASE FOR ORGANISATIONAL TRAUMA

Trauma at the levels of the individual (eg caused by life-altering accidents and personal experiences) and the collective (eg caused by wars and natural disasters) are accepted and well-documented in the literature. A 'trauma-informed approach' is becoming common parlance in sectors such as education, healthcare, social services, and the judicial system<sup>3</sup>. But what about organisational trauma?

It is only in the last decade that literature on organisational trauma has begun to emerge<sup>4,5,6,7</sup> and form a coherent field of study. According to Stephanie Hartung<sup>8</sup>, "...not only individuals as open systems can be traumatized. Trauma also affects groups of people as well as social structures formed by individuals – such as organizations – because they are open systems, too."

Jan Jacob Stam<sup>9</sup> raises the possibility that a culture can be overwhelmed when he asks, "perhaps it is possible that there is a 'field' that can be traumatised?" Similar to transgenerational trauma where the experiences of parents affect the development of their children (and in some cases, subsequent generations<sup>9</sup>), traumatic events in an organisational system are stored in the visible and invisible structures of its culture and its collective memory<sup>10</sup>. In such cases, new employees can seemingly be influenced by the organisational narrative and attachment to a past that they had never known.

*"Trauma, in essence, is all about overwhelm and broken connections. Circumstances and events which might overwhelm one person (or organisation) could prove manageable to another."*

ANNGWYN ST JUST

Anngwyn St Just<sup>11</sup> defines trauma as when "the system is so overwhelmed by the experience that it is not capable of bouncing back to its original strength." Philippe Bailleur<sup>12</sup> reflects that, "few of us immediately associate trauma with organizations. Yet they too can be hit by events that transcend their ability to cope. This damages the relational fabric of an organization to varying degrees, negatively impacting the healthy functioning of the organization, often for several years or longer."

It is important not to confuse trauma and the everyday stresses of organisational life. The key difference according to Bailleur is the organisation's "ability to function on balanced physical, emotional, mental and spiritual planes" following a major event or series of events or persistent toxic conditions. Organisational trauma is usually detected in retrospect, when symptoms of distress are evident such as fractured relationships and a pervasive 'stuckness'. The distress can usually be tracked back to a particular event or series of events. It is now possible to identify which organisations might be more susceptible to cultural trauma (see section 4). Importantly, what is traumatising for one organisation may be 'business as usual for another'. It all comes down to the extent to which the organisation (or even a specific function or team) is given enough space and resources to process the associated emotions to deal with the experience.

So what are the benefits of identifying that a system is in the grip of organisational trauma? If an organisation is in distress and leaders have no understanding of trauma, then there is little likelihood that healing or transformation will take place. The underlying trauma and its associated distress will continue to affect performance, productivity and staff wellbeing. The original trauma must be acknowledged for the organisation, function or team to begin to move forward – and this is difficult if there is no recognition that organisations can be traumatised. A systemic approach helps, one that enables leaders to track back over historical events such as organisational restructures as well as considering the influence of the broader context within which the organisation sits.

## 4 DIAGNOSING ORGANISATIONAL TRAUMA

What should leaders and OD professionals look for as indicators of a traumatised organisation? Combinations of the following 'symptoms' are highly suggestive of organisational trauma:

- Stuckness, heaviness, lack of flow between departments and between the organisation and the outside world
- Inability to be agile: rigidity when faced with change, an acute over-reliance on procedures/regulations
- Denial that anything is wrong
- Strong internal focus with broken connections between people/teams/departments/stakeholders, resulting in difficulties co-operating
- Teams acting in isolation instead of connectedness
- Pervasive atmosphere of stress & anxiety accompanied by widespread cynicism, exhaustion and a loss of hope that things could improve. Feelings are rarely expressed and frequently denied
- Bullying, harassment and exploitation of workers and suppliers and silence about improprieties often resulting in people hiding behind legal advice
- The external environment is vilified (they) while the internal environment is idealised (us)
- Erosion of the organisation's identity & values
- 'Presenteeism' – an inability to take leave even when legitimately sick; and an inability of key personnel to move on – for example, to new positions in other organisations
- Damaging historical events that have had no completion, along with repetition of traumatising events on same dates ('trauma birthdays')
- Communities around the organisation that cannot move on

### SUSCEPTIBILITY TO ORGANISATIONAL TRAUMA

Trauma is not the result of an objective event but a subjective response to an event: what traumatises one person or organisation might not significantly trouble another. Research has shown that there are some factors that support an organisation's resilience and some factors that might make some organisations more susceptible to becoming traumatised.

FACTORS MITIGATING SUSCEPTIBILITY	FACTORS EXACERBATING SUSCEPTIBILITY
Strong core identity	Being a 'mission-driven' organisation
Organisational self-esteem & self-efficacy	Unproductive relationships between the organisation & its communities/markets
Effective structures and processes	Organisational amnesia - loss of connection with founding values & principles
Hopeful, collaborative & energetic leadership	Unrecognised wounding from previous traumas
Positive connection to peer agencies	Limiting attitude & worldview set at the organisation's creation
Availability of trauma-trained cultural experts	Poor crisis management practices

Based on the work of Pat Vivian and Shana Hormann



## SOURCES OF ORGANISATIONAL TRAUMA

ORIGIN	EXAMPLES
Sudden & Abrupt (causes can be internal or external)	Natural disasters
	Major accidents
	Attacks on the workplace, including sabotage, acts of terrorism and massacres
	Technology disasters
	Financial and economic crises & stock market crashes, or the sudden withdrawal of essential funding by donors
	Environmental pollution (eg 'dumping')
	Suicide or unexpected death of founder/leaders

Based on categories articulated by Philippe Bailleul, Pat Vivian and Shana Hormann

ORIGIN	EXAMPLES
Slow & insidious (causes can be internal or external)	Secret and sustained financial impropriety
	Repeated acts of bullying, sexual exploitation or discrimination
	Abusive or destructive management practices
	Threats or overt hostility directed at the organisation from the community
	Employees' exposure to multiple examples of human calamity
	Extended periods of extremely stressful circumstances
	Denial of, or not taking responsibility for, the effects of behaviour on customers – as in compensation claims
	The strategic removal of founders and significant personnel
	Mergers and acquisitions
	Adverse effects of poor governance and organisational processes
	Unresolved critical incidents in the organisation's history
	The mission of the organisation – for example, military, health service, etc, where staff are in daily contact with human suffering

Based on categories articulated by Philippe Bailleul, Pat Vivian and Shana Hormann

We hope that the different typologies of organisational trauma listed here, begin to help shape your sense as leaders and practitioners of how to orient and attend to the stuckness that is an endemic characteristic of this phenomenon. For example:

- Is the precipitating event external in its point of origin or internal (research shows that internally-precipitated organisational trauma is more difficult to deal with)?
- Is the cultural wounding sudden and abrupt – a ‘stroke of fate’ that overwhelms the organisation’s abilities to cope – or slow and insidious (in which case it is likely to be harder to heal)?
- Are teams suffering from vicarious trauma, caused by extended and repeated periods of exposure to human suffering – in which case more specific individual and team supervision will be called for? Understanding the nature of the trauma can begin to shape the ways in which organisational trauma can be dealt with...



## DEALING WITH ORGANISATIONAL TRAUMA: OUR PRACTICE FRAMEWORK

### FRAMEWORK CONTEXT

Within the context of the work we are discussing here, it may be best to think about organisational trauma as a form of adaptive challenge<sup>12</sup>. Adaptive challenges are ambiguous, systemic problems with no easy answers. They often have many interdependent and entangled aspects to them; can arise from a variety of triggering events and occurrences; and require from leaders and change professionals a certain flexibility (there are no blueprints or generic solutions!) and an openness to thoughtful and compassionate exploration and intervention.

Regarding organisational trauma as an adaptive challenge requires a responsive willingness from leaders to be in dialogue with those most impacted. This enables a co-creative approach to working with the experience of collective trauma so that the organisation, and the individuals who work within it, can move beyond the traumatic experience.

*"Working with a trauma-informed approach can help the organisation find ways to restore broken connections, and a sense of resilience and resourcefulness for moving forward together."*

A trauma-informed approach in organisations supports leaders, teams and internal or external OD professionals to develop a common frame of reference for understanding and talking about their experience, as well as a practice framework for making changes that are coherent, considered and facilitative at the level of the whole as well as at the levels of team and individual experience. Working with a trauma-informed approach can help the organisation and its members find ways to restore organisational health, balance, belonging, and a sense of resilience and resourcefulness for moving forward together. But how is this accomplished?

### FRAMEWORK PRINCIPLES

Fundamental to our approach is the importance of working in ways that are systemic, embodied and emergent.

- By 'systemic' we mean to point practitioners towards acknowledging the historical events that precipitated trauma; to identifying recurring patterns of dysfunction and locating them in the relational and cultural space of the organisation rather than blaming individuals or teams; and to connecting themes inside the organisation to interrelated community and social themes that get enacted within the organisation.
- By 'embodied' we mean to point practitioners towards having a more phenomenological perspective and to developing the awareness and ability to work with people's emotional as well as cognitive experience. Embodiment explores the relationship between our physical being and our energy and health, so embodiment practices focus on self-awareness, mindfulness, connection, self-regulation, finding balance, and creating self-acceptance.
- By 'emergent' we mean to point practitioners towards fostering an open systems mindset where solutions are co-created through dialogue rather than dictat; and to having the flexibility to respond to the specific issues within the organisation in ways that are adaptive – so that decision-making is context-sensitive and timely.

## USING OUR PRACTICE FRAMEWORK

This framework does not suggest specific interventions. It is more akin to a compass, that should help orient leaders, coaches and consultants and give them a scaffold to design interventions that are culturally appropriate and specific to the types of trauma that are being enacted – for example, ways of working with external, sudden and abrupt event-based trauma (such as an act of terrorism) might need to be very different from ways of working with internal, slow and insidious, vicarious trauma (such as Emergency Services teams working daily on the front line to alleviate suffering).

Our approach for dealing with organisational trauma is based on the idea that organisations need both conversational spaces and action pathways, that are interconnected by revitalised leadership.

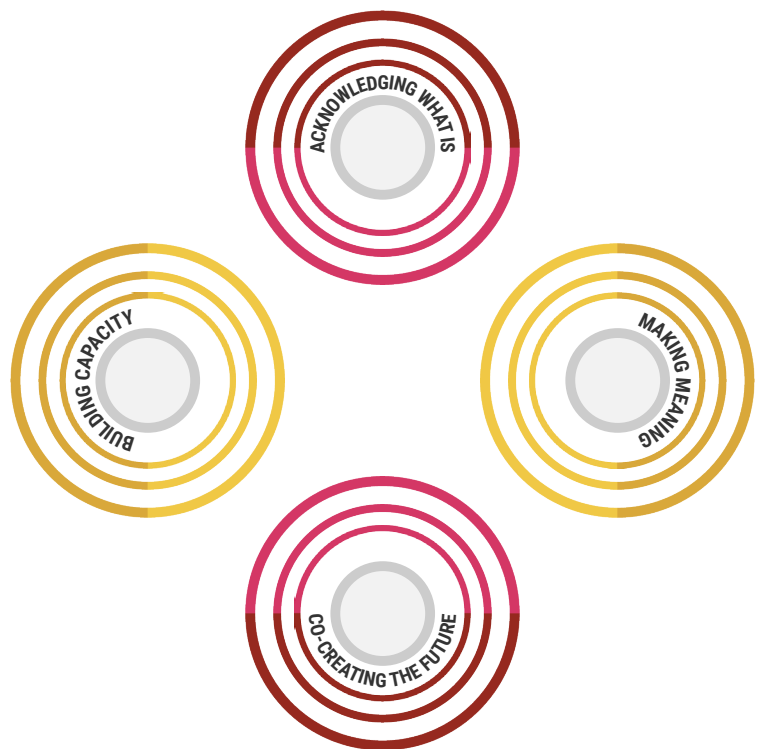
## CREATING CONVERSATIONAL SPACES

Dialogue is essential to changing the quality of conversations within an organisation, and therefore to changing the ways that people relate - moving teams from stuckness to flow; from rigidity to adaptability; from lifelessness to agility. Dialogue helps to resolve conflict, rebuild trust, inspire new ideas, create meaning and open possibilities.

There are four kinds of conversational spaces to hold, both within and across functions, specialities, locations and hierarchical layers:

- A space for *Acknowledging What Is* – naming without judgment what has happened and its current impact / unintended consequences
- A space for *Making Meaning* – where understanding can be attained and where events and actions can be re/framed to help move people on
- A space for *Co-Creating the Future* – where new possibilities can be surfaced and hope can be shared through renewed purpose/ vision
- A space for *Building Capacity* – where the organisation can focus on adapting and building skillsets and mindsets that bring coherence and momentum

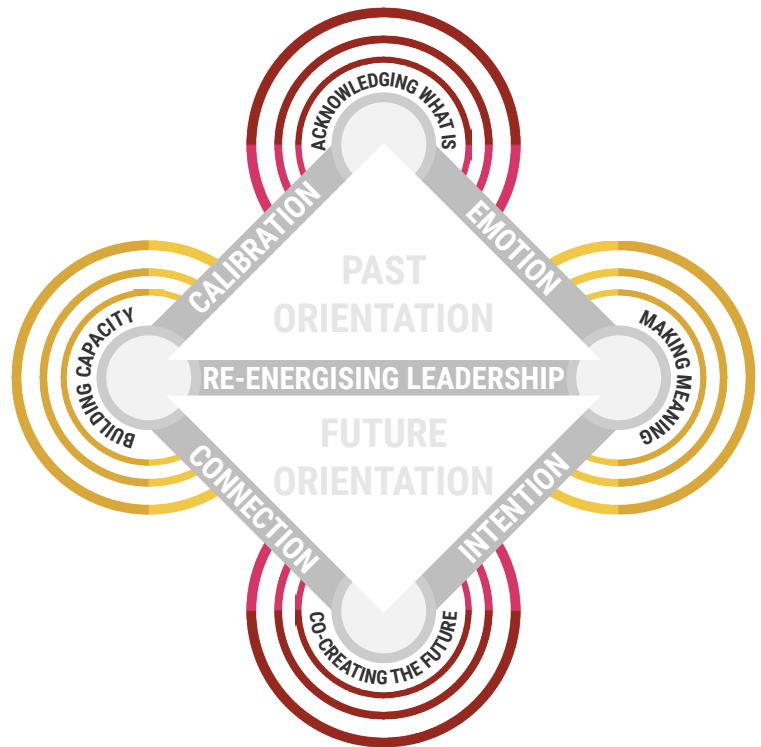
There is no predetermined sequence for these conversations – organisations need to start with the most pressing issues, and be able to move flexibly between the conversations, allowing time for reflection and integration.



## ESTABLISHING ACTION PATHWAYS

These conversational spaces are intimately interconnected by 'Action Pathways' – for example, the path of *Emotion* has to be walked between 'Acknowledging What Is' and 'Making Meaning'. People need support to work constructively with their feelings. Feelings of loss, grief, rage, helplessness, numbness and more need to be expressed about the causes and consequences of trauma, but these feelings also need to be contained safely. This calls for very particular coaching skillsets and capacities in leaders and facilitators.

Some judgment is needed to determine what the team, function or organisation is capable of doing at various stages of building capacity, so *Calibration* is a priority between 'Acknowledging What Is' and 'Building Capacity'. Encouraging frequent positive small steps in the right direction at a pace the team can handle is much better than rushing forward to build capacity for change overnight. Putting pressure on for too much agility too soon can be counterproductive with traumatised organisations.



*Intention* must be set to energise the path between 'Making Meaning' and 'Co-Creating the Future'. *Intention* in this context might have the form of a purpose statement, or a vision, or a team charter for behaviours that need to be emphasised. *Intention* might also be signalled by making resources available to enable teams to realise the organisation's strategy. Supporting a leadership team to agree on what needs to change in the organisation – what needs to be ended or removed that is getting in the way; what needs to be created that does not yet exist, that would support forward movement; what needs healing in the culture, that requires sustained compassionate focus; these are important questions for leaders to align on intentionally.

The path of *Connection* has to be forged if people are to Build Capacity in ways that Co-Create the Future... Broken connections are a feature of organisational trauma so rebuilding relationships within and outside the organisation is vital. Work here might be at the level of shared values, or of restoring a sense of belonging through working on team and organisational identity.

## THE ROLE OF LEADERSHIP

Perhaps the starting-place, and central to our own approach to working with traumatised organisations, is to re-energise the role of leadership at all levels of the operation. Leaders first need to attend to their own wellbeing & needs - including how they might bring their own struggle & vulnerability to light. In addition, leaders have to look back at the past (where have we come from and what happened on our way to the present?) and forwards to the future (where are we going to and what has to happen to get us there?) while creating distinct conversational spaces and promoting practical action pathways to connect meaning-making and capacity-building. The role of leadership in dealing with organisational trauma is fundamental to an organisation's ability to navigate the internal and external challenges of organisational life. The way a leader supports people through traumatic times is uniquely powerful, and the ramifications long-lasting. During a crisis, employees look to their institutions to support and protect them. An absence of due care and attention during such times, according to Manning<sup>13</sup>, is seen as 'institutional betrayal' and experienced as a second injury.

## ADDITIONAL CONSIDERATIONS

Correctly identifying trauma and traumatisation sets the stage for effective intervention, so leaders need to learn about organisational trauma and be able to recognise its characteristics. There are three pivotal points in the unfolding of a traumatic event that, if responded to effectively and compassionately by the leadership, will influence the extent to which an organisation is, or continues to be, in post-traumatic grip. These are: managing a crisis; recognising and acting on the signs of organisational trauma in your team; and knowing the point at which to seek external help.

### Managing a crisis

In addition to the agreed crisis management procedures organisations will already have in place, to be followed in the face of a critical event, Manning identifies three overarching concepts to guide the human dimensions of leading through and in the immediate aftermath of a crisis.

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

Getting this right will reduce the potential for organisations lingering in the wounded state of organisational trauma.

*“Trauma has unavoidable impacts on leadership decision-making, team dynamics, organisational values and culture.”*

LARA TCHOLAKIAN

### Recognising organisational trauma in your team

While leaders cannot always protect an organisation from trauma, they can help protect the organisational culture from traumatisation. With the turnaround of occupants in leadership positions it is not always possible for leaders to be sighted on the fact that trauma might be at the heart of any unhelpful dynamics affecting a team or organisation. A systemic awareness helps leaders to be attentive to patterns in the history of an organisation that might point to organisational trauma. In addition, and as Vivian and Hormann, point out: *“Leaders need to be aware of their own history, predispositions, strengths and shortcomings. Without an understanding of their own patterns and behaviours, they run the risk of being influenced unconsciously by blind spots in their thinking or being triggered by their own experiences and memories”*. We believe that it is important to acknowledge that leaders themselves can carry shame and/or guilt when trauma happens ‘on their watch.’ They might need additional coaching support individually and/or as a leadership team, to work through understandable feelings of not having done enough or been good enough.

### Knowing when to seek help

The opportunity to talk the situation through with a trusted advisor, such as a trauma-informed executive coach, often brings the insight that the dysfunction the leader is noticing is not necessarily about their leadership ability or any individual’s shortcomings, but related to something hidden deeper in the system. This can be deeply cathartic for leaders and an important intervention in its own right. The coach can then support the leader to identify and implement interventions to promote recovery and healing in the system.

Sometimes, however, there may come a point at which external facilitation is needed and the leader needs to know when that milestone has been reached. Vivian and Hormann<sup>1</sup> suggest that outside help is important especially when the leader is unable to maintain a non-anxious approach. Specific examples include when leaders becomes personally overwhelmed by the trauma itself

or the situations they face; or when the leader is unable to separate their own behavioural patterns from organisational patterns; and finally, where the team, including the leader, is grieving.

In such cases, someone not impacted by the situation is needed to enable the team to reconnect with their strengths and resources. The maintenance of good boundaries and a healthy detachment are essential in this respect.

*“Trauma is not an external event but the internal process of dealing with an overwhelming situation. The deepest pain of trauma is numb and mute.”*

THOMAS HÜBL

## 6 CONCLUSION

Given the attention that collective trauma is receiving today, it is both surprising and alarming that organisational trauma is rarely mentioned, acknowledged, researched or discussed. This is despite widespread understanding of organisations as living systems which can function in states of health and sickness. Indeed, the whole subject of organisational trauma remains a blindspot in the theory of practice of most organisational practitioners. As Hartung states, *“Opinions differ on the question of whether there can be traumatised organisations.”*

In addition, identifying and working with potential organisational trauma remains a challenge for leaders, managers and OD professionals whose work is becoming more trauma-informed. Part of the problem is that trauma in organisations is often not recognised as such, especially by those leading organisations. Tcholakian<sup>14</sup> laments that, *“...one topic that remains persistently omitted is the effects of collective trauma on leader development.”* This is despite the fact that trauma has unavoidable impacts on leadership decision-making, team dynamics, organisational values and culture.

While organisational trauma as a specialist area is still unacknowledged by mainstream OD theorists and practitioners, evidence-based, practical approaches remain unclear. However, it seems from our experience that adopting a sensitive, slow and phased approach to working with organisational trauma is important.

Working with trauma requires attunement – and so working ‘with the grain’ of the organisation’s culture and processes at a pace the organisation can sustain, is vital to liberate the self-renewing capacities of the system. Also, working at a pace that is supportable by the system is important – this could include not trying to rush things, but looking for periods of stability that might open up a window for trauma responses to surface and be dealt with.

Our hope as authors of this White Paper is that we can contribute to raising awareness of this important subject and also stimulate thinking about what leaders and OD practitioners can do, practically.

### COMMON ASPECTS FOR EVERYONE

1. Familiarise yourself with the organisational trauma ‘compass’ (our Practice Framework) and instigate conversational spaces, action pathways and re-energised leadership.
2. Recognise that this is work that takes time and can evoke strong feeling and responses such as anxiety, fear, stress and resistance (often showing itself as refusal, judging, criticism and complaint) and allow that understanding to help you see this as being part of the inevitable pattern of things (including at times within yourself). From that basis you can act with compassion for what ‘currently is’, and a supportive curiosity for what can ‘yet be.’

### FOR LEADERS

Leaders looking to work in a trauma-informed way with teams and systems affected by organisational trauma are asked to be able to go a little further than others in the system, be more able to tolerate anxiety so as to be able to help others do the same and to find ways of describing that which can at times feel wholly uncertain, unpredictable and challenging. In this, leaders need to recognise their own needs to attend to their personal wellbeing and self-resourcing as much as the needs others have for them to be resourcing and attentive more generally. Drawing on the following ideas and practices can help leaders do this work better.



1. Use the organisational trauma compass to begin acknowledging the past as well as inviting the future.
2. Develop the skill of discerning and being able to move between support and challenge as the need arises.
3. Working with the 4 levels of awareness:
  - Awareness of self (what am I paying attention to/what am I not attending to?)
  - Awareness of other (what am I noticing about how others are doing/saying/enacting?)
  - Awareness of the relational space (what is happening between us at this time?)
  - Awareness of the systemic field (what is the wider pattern emerging and how do I help others see this too?)
4. Being able to centre into one's own being (breathing into one's core) as a practice for holding one's own anxiety and sense of not knowing, so that others can be invited to do the same.
5. Practising storytelling (so as to help create pockets/threads of meaning) and building the narrative thread across time and context (so as to build continuity across the different pockets of story arising in teams and systems). Being able to help restore a sense of coherence in meaning-making and also weave in wider stories of resilience, getting through, and going beyond trauma supports others to see their experience in a wider context of meaning and other stories.

## FOR ORGANISATIONAL DEVELOPMENT SPECIALISTS

For those looking to support leaders and teams, and in addition to all of the above suggestions, we would invite you to:

1. Pay attention to how you make use of your own experience (commonly referred to in OD as use of 'Self as Instrument') as a way of helping others explore theirs more fully.
2. Attend to your ability to bring presence, attentiveness, curiosity and space for everything that shows up so as it can be included and worked with.
3. Remain interested in what isn't showing up in the team or system that otherwise you would have expected to be there.
4. Reflect on the coherence of your approach in this space (what is your theory of change and theory of practice in terms of working with organisational trauma?).
5. Develop your skills, presence and ability to support individuals, teams and systems to safely and creatively work with trauma so as to be able to thoughtfully and properly move past it.

*"Growth seems more likely for people who are resilient, optimistic and hardy, and who face life-crises that represent irreversible changes – because a new level of adaptation must be achieved."*

TEDESCHI & CALHOUN

Finally, just as there is for some individuals who have experienced calamity and been traumatised, organisations might also experience post-traumatic transformation.

Where understanding and support for healing are available, and where organisational structures and practices are attended to, new levels of adaption can be achieved. It is possible that the aftermath of a traumatic event can be viewed as something that is a potential source of benefit. As Tedeschi & Calhoun<sup>15</sup> say, "What we have found new and remarkable is how often this happens and how apparently ordinary people achieve extraordinary wisdom through their struggle with circumstances that are initially adverse in the extreme."

## 7 CASE STUDIES

### CASE STUDY 1:

#### USING THE FRAMEWORK TO RECONNECT & REALIGN TEAM RELATIONSHIPS IN A HEALTHCARE SETTING

##### Overview

A senior team in a healthcare organisation had been experiencing barriers to effective, easeful team working. The service had moved from NHS to local authority commissioning some years previously and the service was recommissioned in five year cycles. The last contract renegotiation saw a major service redesign which included the closure and merger of certain services and several unexpected and unprecedented redundancies.



##### Trauma indicators

- The healthcare organisation experienced a loss of control resulting from the move to Local Authority Commissioning
- In preliminary one-to-one conversations with senior team members, the atmosphere of the team was variously described as 'stagnant', 'oppressive', 'chaotic' and 'toxic'. A number felt it was 'unsafe' to voice their views and didn't know who to trust.
- Sickness rates were high and several team members used words such as 'stuck' and 'rigid' when reflecting on how the team worked together.
- The majority of team members referred to the service redesign five years previously as a major turning point. Before that the team had reportedly worked relatively harmoniously together. Only half had been working in the team at the time of the service redesign, yet all spoke with the same conviction that this event was at the heart of the current difficulties. This suggested that trauma had become embedded into the relational fabric of the system and was being absorbed by new team members as an unconscious mental process.

##### What made a difference?

It was in acknowledging 'what is' that change could occur. As part of the one-to-one conversations, team members were invited to create a systemic map of how they experienced the team and their place within it. As well as providing diagnostic information, this 'mapping the system' approach developed by Whittington<sup>16</sup> enabled team members to see the whole system with fresh eyes and acknowledge the situation just as it was. The approach brought perspective and insights into the wider systemic influences that were beyond the control of leaders.

During the systemic mapping process, each team member was invited to take a virtual step towards 'better' by moving their own representative to a different place. In taking this step, team members were able to 'feel in to' what this movement might make possible for them and the system as a whole. It was a ritual of sorts and, drawing on 'solution-focused' principles, enabled team members to recognise that forward movement was possible, paving the way in readiness for change.

## Outcomes

- This early work with the team provided essential diagnostic information upon which to design a programme of support.
- In addition, several team members fed back that the one-to-one conversations and systemic mapping had been cathartic. The subsequent organisational development included regular coaching sessions with the leader and a workshop with the team.
- A key element of the team workshop was an approach that combined a 'Living History' structural constellation with Bailleur's 'Timeline' approach. Careful contracting and 'holding' was needed but the ensuing conversation was rich and deeply moving. The intervention enabled the leader and the team together to acknowledge the difficult history and begin to make their peace with it.

This was a complicated situation, though. The circumstances surrounding the original trauma – the contract renegotiation – repeats every five years bringing with it a reminder of a difficult period with its associated fears and anxieties. Compassionate trauma-informed leadership and sensitive handling of future contract renegotiation programmes will be essential to enable the team to grow beyond the original trauma and find ease in working cohesively again.

## CASE STUDY 2:

### USING THE FRAMEWORK TO RESTORE RELATIONSHIPS WITH THE LOCAL COMMUNITY & REGULATORY AUTHORITIES IN THE PETROCHEMICAL INDUSTRY

#### Overview

A multinational petrochemical company had a small manufacturing base in a village in a UK 'Area of Outstanding Natural Beauty'. Global market swings made the costs of UK manufacturing unviable, so the parent company divested itself of the business and sold it to a consortium of managers who renamed the company and refocused production. One night, an accidental chemical leak of noxious gas into the air resulted in families nearby being evacuated and scores of people from the community being admitted to hospital for tests while plant personnel and the emergency services got the situation under control. Although there were no fatalities and no serious harm to anyone, a series of lawsuits saw substantial financial payouts to the community.



Further accidental pollution into the air and nearby river over the following 2 years saw further fines from Government environment agencies, adverse TV and press attention, workers were threatened and harassed and some villagers campaigned for closure of the chemical plant. This was hugely controversial as the site had been the main employer in the area for over 100 years. Shortly after, waves of redundancies were announced. Rifts appeared between a besieged management team and the workforce, and the site became entangled in internal and external disputes with a loss of productivity and profitability.

#### Trauma indicators

- Divestment by parent company
- Change of corporate identity
- Environmental pollution through repeated accidental chemical leaks into the air and nearby river
- Splits between the organisation and community leading to an 'us vs them' focus and then between the leadership team and workforce
- Large-scale aggressive redundancy programme
- General culture of hopelessness and stuckness among the workforce
- Limiting attitude & worldview set at the organisation's creation

#### What made a difference?

The company had no Crisis Management plan in place nor had any leaders received spokesperson training, so it was a priority to create a crisis communications strategy and ensure that leaders and managers were equipped to talk to the press, the local community pressure group and local villagers.

Dialogue was fostered through instituting a regular series of community liaison meetings externally and cross-functional breakfast meetings internally, where villagers and employees could be in honest and open dialogue with senior leaders about any concerns. While sometimes explosive, these meetings allowed space for venting feelings and for leaders to listen deeply and consider reframing the perceptions and misconceptions that were abounding.

A fundamental feature of the communications work with all stakeholders, was the focus on honesty, and non-judgmental

acknowledgement of what had happened, along with transparency about the redundancy programme.

What also helped was putting the event into its historical context - while many workers had lost hope in the future, focus was given to telling the story of manufacturing on that site over the last 150 years, and of how much the site had mattered to local people throughout its history; while at the same time, workshops were held that reconnected workers to the purpose of the enterprise and to its core values.

## Outcomes

The situation did ultimately lead to the closure of the company and site, although this was probably a 'given' anyway given the movement within the whole industry to less expensive overseas manufacturing. Other outcomes included:

- A renewed sense of agency and energy in the leadership team
- Improved dialogue between levels of the organisational hierarchy and with the local community
- A de-escalation of aggression and violence between employees and villagers
- Greater focus on the new purpose of the organisation and a partial restoration of pride in the heritage of the company
- Improved governance and organisational procedures
- Improved relationship with local agencies including The Environment Agency, local press, and the community watchdog group

## CASE STUDY 3: USING THE FRAMEWORK TO RE-ENERGISE LEADERSHIP & RESTORE ORGANISATIONAL CONFIDENCE IN THE FUTURE, IN THE ENERGY SECTOR

### Overview

This global company had gone through a merger and three waves of redundancy in the last five-year period, due to market turbulence in the energy sector. The last wave of redundancy (representing 20% of the workforce) was triggered by the Covid 19 pandemic. Communication had been done in haste and virtually, and the workload and team morale consequences for the remaining workforce had not been fully considered. After a short time, because the feared loss of business due to Covid had not materialised, the company had to recruit even more staff than had been laid off, leading to consternation and mistrust in the workforce. The workload for the remaining employees was extremely high and the loss of talent and expertise was deeply felt. As the leadership team began to feel isolated from their people, we were asked to conduct a cultural audit to determine the root causes of 'stuckness' and to suggest ways forward.



### Trauma indicators

- Merger and renaming of the business function leading to loss of organisational identity
- Multiple redundancy programmes
- Upheaval and overwhelm caused by the Covid 19 pandemic
- Transformation of the whole energy business sector
- Loss of connection between different parts of the organisation
- Leadership team isolation and leaders not feeling hopeful and energised
- People kept referring to the past and displaying no trust in the future

### What made a difference?

The Cultural Audit (in the form of a confidential opinion survey with a cross-section of team members from different functions and geographical locations) gave the workforce a voice. While the leadership team felt shocked at the findings, they agreed to share the results with their team leaders with no 'dressing' of the findings or messages. This simple acknowledgement of people's feelings began to close the gap between the leadership team and senior managers.

Leaders were encouraged to provide a rationale for their decisions and to begin to work more collaboratively. Virtual workshops were facilitated that enabled Directors and Senior Managers to co-create a shared Purpose and Vision for the merged business, and enabled people to gradually re-engage and make sense of both the current reality and a potential future focused on growth. A significant aspect of these facilitated sessions was the focus on past, present and future – what was the organisation's heritage and what were people proud of? What remained that was of value and should be nurtured? Where might stability and growth come from moving forwards?

The leadership team resolved to work on their own collaboration and communication with a series of structured explorations and interventions; and through 'Action Learning' approaches, space was created for people to collaborate across geographies and specialisms, to share feelings as well as current personal and workplace difficulties, and to receive support from colleagues.

Senior stakeholders (including major clients) were filmed and their opinions were sought on how the new Vision and Strategy would help the organisation navigate future challenges. These short films – shared at a series of workshops with senior managers and given to them to pass on to their own teams – helped to inject energy and hope into the system.

## Outcomes

While the restoration of employee confidence and engagement is an ongoing feature of work with this client, significant improvements had been noted after only six months. These included:

- The closing of the 'trust' gap between business leaders and senior managers with refocused communications – including a move away from formal, top-down communications to more transparent and consultative communications
- Organisational leaders working together more dynamically as a team, showing more connection and care for one another, a greater ability to challenge one another's thinking, and a greater willingness to collaborate between themselves and with their direct reports.
- The beginnings of a lighter atmosphere in workshops with senior managers, and a willingness to engage in robust dialogue
- People beginning to re-engage with the future direction of the business
- More focus on Diversity, Equity and Inclusion practices with new appointments at senior levels from under-represented minority groups

## CASE STUDY 4: USING THE FRAMEWORK TO SUPPORT INTERNAL CONSULTANTS IN EXPLORING POSSIBLE ORGANISATIONAL TRAUMA IN A PUBLIC SECTOR ORGANISATION

### Overview

During the COVID 19 pandemic, work with senior leaders at executive level and with senior operational managers in a Public Sector organisation revealed the continued reoccurrence of a number of serious workplace themes. These included the loss of coherence and meaning around the organisation's sense of direction and ability to move forward; a loss of a sense of identity and purpose as leaders; and reduced ability to guide junior colleagues in the midst of crisis as the organisation attempted to meet the challenges of the pandemic. The pervasiveness of these themes was striking.



In addition, when working with different groups across the organisation, practitioners also noticed a sense of bodily heaviness that alternated with difficulties in thinking clearly and a 'felt sense' of restlessness and anxiety. When sharing this experience and exploring with those present to determine whether this had any resonance for directors and managers, many acknowledged their own similar experiences, and several offered that this had become an almost daily experience for them. Privately, some leaders shared their sense of guilt around finding themselves contemplating leaving the organisation in the face of feeling so overwhelmed and fearful.

### Trauma indicators

Using the framework as a tool for peer review with OD colleagues about what they had experienced with senior leaders and operational managers, the consultant was able to hypothesise the potential of organisational trauma in this system. Additional to what has been described above, the organisation also showed a number of insidious trauma indicators alongside the more sudden and abrupt one around the pandemic. These included:

- Examples of service failures over time resulting in harm caused to service users
- Leadership practices that in times of crisis and pressure veered towards a critical and uncaring use of positional power
- The sudden removal of leaders and managers deemed to have not delivered expected results – and with no narrative accompanying these decisions, staff experienced these acts as highly disconcerting, anxiety provoking, uncaring and in direct conflict with the espoused values of the organisation
- Unresolved critical incidents in the organisation's history, such that similar failings would continue to occur in different parts of the organisation, as if this was a repeating pattern at the level of the organisation as a whole, and the organisation, despite stated intentions and lessons learnt processes, seemed unable to learn or move forward

### What made a difference?

Having the framework available as an aid for reflective practice, discussion and exploration in an OD peer supervision space helped practitioners explore the possibility that the organisation they were working with was one characterised by organisational trauma. Additionally, being able to do this in a learning space with colleagues who could bring other perspectives and appropriate support and challenge as needed, helped to map out the available data. The framework was then used for sense-making rather than simply retrofitting data to the framework (a potential risk when a new way of making sense of phenomena is available and which in turn may come to shape how experience is subsequently 'filtered').



## Outcomes

The process of meeting organisational leaders just where they were in their experience and then being able to use the framework outlined in this White Paper for sense-making, helped reflection about how to proceed in subsequent conversations. This in turn has helped practitioners to:

- Be able to acknowledge the difficult and potentially damaging patterns of interaction, feeling and responding that can get evoked
- Be able to recognise these emergent patterns so that they could be engaged with rather than reacted to
- Help leaders and managers to notice dysfunctional patterns as they arose – in themselves and in colleagues – and thereby explore ways of staying in touch with themselves and each other, through meaningful dialogue
- Use the framework as a process-tool for having a conversation with senior leaders about the topic of organisational trauma how to work with it
- Use the framework as an 'inquiry and support' planning tool in relation to the conversational spaces and action pathways that groups and wider service areas may need to employ and explore as a way of getting through and moving forward

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## 10 APPENDICES

### APPENDIX I - DEFINITIONS OF ORGANISATIONAL TRAUMA

Trauma '*Trauma*' is the Greek word for 'wound'. It signifies a serious injury to our body, mind or spirit. Trauma can be succinctly defined through "the 3 Es:"

- An **Event** that is emotionally painful or distressing,
- that is **Experienced** as abnormally intense or stressful,
- and which has **Effects** on physical and mental health in ways which are adverse and lasting.

Because individuals who experience such stressful events do not perceive or react to them in the same way, trauma may not always be the result. Individuals may experience potentially traumatic events (PTEs) without suffering trauma. Also, research suggests that with appropriate supports, positive personal growth can arise from events perceived as traumatic. This experience is referred to as post-traumatic growth and possible manifestations include, but are not limited to, increased appreciation for life, increased personal strength, spiritual change, altered priorities, and more meaningful interpersonal relationships.

Traumatic events can be singular, repeated, or chronic. Traumatic experiences can include physical injuries, job-related events (eg, medical first responders and military personnel), interpersonal violence (eg, domestic violence), political terror or war, and adverse childhood experiences (ACEs).

Research suggests that effects from individual trauma can be passed throughout generations, a phenomenon referred to as intergenerational transmission of trauma. A review of research on war survivors noted that a majority of studies examined, found negative behavioural effects on the children of survivors, suggesting a transmission of trauma from parent to child.

Individual Trauma	An emotional response to a distressing event or series of events, that affects one person and impairs that person's ability to cope.
Collective Trauma	Refers to the impact of a traumatic experience on entire groups of people, communities and societies.
Vicarious Trauma	Results from being exposed to repeated and sustained examples of human suffering.
Symbiotic Trauma	Results from being recruited into a traumatised organisation.
External Trauma	The origin of the trauma comes from outside the organisation.
Internal Trauma	The origin of the trauma comes from within the organisational boundary.

## APPENDIX ii - ABOUT THE AUTHORS & MEUS

This White Paper is authored by Ty Francis PhD, Director, *meus*; Eileen Moir OBE, Director, *Turning Tides*; Gareth Evans, Senior OD Manager, *Betsi Cadwaladr University Health Board*; and Anne Roques, Director, *Evolution Coaching*.

### Ty Francis PhD

Ty is the founder and a Director of *meus*. A seasoned OD practitioner whose work draws on leading-edge systemic approaches to cultural transformation. He works across sectors on complex projects that require collaborate and cocreation, with some of the world's leading corporations as well as with Government & Public Sector organisations.

He has been a Guest Faculty member at leading UK Business Schools including Ashridge, Cranfield and Henley. Ty completed his Doctoral research on the psychology of 'breakthrough'; published his first book on new directions in Gestalt coaching in 2017; and pioneered the practice of Organisational Constellations in the UK. He is also currently pioneering approaches to film-based facilitation and developing systemic approaches to working with Organisational Trauma.



### Eileen Moir, OBE

Eileen founded *Turning Tides* - a bespoke consultancy - in 2012, specialising in helping people and organisations navigate change. Before that she was an Executive Director in the NHS with over 30 years' experience in complex public sector organisations. Her last NHS role was as an Executive Director with the national body that leads on healthcare improvement in Scotland. Her approach also benefits from 18 years as a mental health practitioner.

Eileen works internationally with senior leaders, executives and middle managers across the sectors as an executive coach and facilitator with individuals and teams. She views the world through a systemic lens but also draws on a range of transformative frameworks. She is a faculty member of *Coaching Constellations* and a supervisor for executive coaches and organisational consultants.



### Gareth Evans

Gareth is a senior OD practitioner and former mental health clinician, with over 25 years' experience working in the NHS (National Health Service). He combines a focus on systemic practice with a fine-tuned attention to the experience of the individual, and works with an approach to OD, coaching and facilitation that is relational, dialogic and adaptively dynamic.

Gareth is a Human Systems Dynamics (HSD) Professional, and has worked, taught and co-led workshops and professional trainings for international audiences with HSD's founder, Glenda Eoyang. Convenor and host of the Welsh Public Sector OD Network, he specialises in creating learning and discovery spaces that help individuals and teams discover their own resourcefulness, emergent insights and next wise actions.



## Anne Roques

Anne is the founder and Director of Evolution Coaching Europe Ltd. She is Franco-British, is based in London and works bi-lingually as a Global Executive Coach between London, Paris and Brussels. She has been an executive coach for international leaders and their teams for the last 22 years.



Anne's background is in Accountancy and Banking, and before establishing her own consultancy, had 18 years' experience of working in Finance, Supply Chain and Change Management roles with global responsibilities, within in a multi-billion dollar global organisation. She has been engaged in trauma-informed coaching for the last 5 years, including working with leaders dealing with suicides in the workplace, and pro bono work for the NHS throughout Covid and for entrepreneurs who have gone bankrupt.

## About meus

Meus is a consultancy specialising in leading-edge approaches to cultural transformation. Along with our community of Organisational Development specialists, film-makers, artists, therapists and educators, we work across sectors in the space between leadership and team development; change management; and corporate communications.

Ultimately, our work is all about people – we design and deliver solutions that create engagement, activate potential and enable a vibrant working culture where people experience a greater sense of connection, belonging and aliveness.

For further information visit [www.meus.co.uk](http://www.meus.co.uk) or email [hello@meus.co.uk](mailto:hello@meus.co.uk)



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