

## R&A Shape of Trust (SoT) Community of Practice (CP) Observation Tool

### Process Evaluation Focal Areas

1. **Contours of collective well-being and trust:** What is important to people? How are they un/attuned, and how might they deepen, to collective well-being and trust?
2. **Contextual factors:** What contextual factors were present? Did they serve as barriers or supports (to participation, program success, building trust and community, etc.)?
3. **Fidelity:** Was the session / curriculum / experience implemented with fidelity to the original design (content) and spirit/intent of the project (process)?
  - a. What transformative models and approaches were used?
  - b. What racial equity, social justice, and belonging (RESJB) practices were used? How do they map onto the Bodhi Frame?
  - c. If there was more than one session (for smaller portions of the cohort, such as with the two Deeper Dive Sessions on March 26th), was the curriculum implemented similarly in each session?
4. **Reach:** Who did the intervention intend to reach, actually reach, and not reach? Why?
5. **Participant experience:** How is the program received by participants, facilitators, and other stakeholders?

Observer Name: _____	Date: _____
Location: _____	
Facilitator 1 Name: _____	
Facilitator 2 Name: _____	
Any additional facilitators? Name(s): _____	
# of Participants: _____	
Session Topics (to be provided by facilitation team in advance of each session): _____	
Observation Time --> Started: _____	Ended: _____
Session Time -----> Started: _____	Ended: _____

If interrupted,

How much time was taken from the session? \_\_\_\_\_ minutes / hours

Reason for interruption (e.g., fire alarm): \_\_\_\_\_

Is this a continuation of a prior session?     \_\_ Yes   \_\_ No

If yes, where does this observation begin: \_\_\_\_\_

**Y**= Yes / A lot | **S** = Somewhat | **N** = No / Very Little

### Contours of trust and collective well-being:

- What's coming up for people that's most important to *them*?
- What kinds of things are they attuned to from a collective health perspective?
- What kinds of things might they be missing from a collective health perspective?
- What kinds of beliefs might people be holding on to that lead to greater harm or health?

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**Context, including barriers & facilitating/supporting factors:** *Aspects of the larger social, political, economic or cultural environment that may influence the implementation of this project, serving as barriers or supporting factors.\**

Broader Context	Y	S	N	N/A	Notes & Examples
Larger social, political, economic, or cultural factors that served as enabling factors to implementation					
Larger social, political, economic, or cultural factors that served as barriers to implementation					
Facilitators	Y	S	N	N/A	Notes & Examples

Two BODHI instructors are always present					
Internal 'Champions' of the work are emerging / have emerged					
<b>Space &amp; Environment</b>	<b>Y</b>	<b>S</b>	<b>N</b>	<b>N/A</b>	<b>Notes &amp; Examples</b>
Adequate space for the types of activities; the space was not overcrowded					
The environment was warm and inviting (e.g., natural light present, flowers, art, music, etc.)					
Instructors reviewed and maintained group agreements					
Participants sat in a 'virtual' circle, demonstrating power with (vs. power over/under dynamics)					
Facilitators created a space open to deep critical thought, joy, grief, vulnerability, honesty, etc.					
<b>Materials</b>	<b>Y</b>	<b>S</b>	<b>N</b>	<b>N/A</b>	<b>Notes &amp; Examples</b>
Adequate materials for the class (e.g., writing tools, handouts, art supplies, etc.) were provided					
<b>Factors that Serve as Supporting Factors</b>	<b>Y</b>	<b>S</b>	<b>N</b>	<b>N/A</b>	<b>Notes &amp; Examples</b>
Factors that naturally existed were leveraged to facilitate reaching and teaching participants					
Factors were created / fostered to facilitate reaching and teaching participants					
<b>Factors that Serve as Barriers</b>	<b>Y</b>	<b>S</b>	<b>N</b>	<b>N/A</b>	<b>Notes &amp; Examples</b>
Problems were encountered in reaching participants					
Actions were taken to name, address					

and/or surmount barriers					
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Additional notes about Contextual Factors: \_\_\_\_\_

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**Fidelity:** *The extent to which the program was delivered as planned; it represents the quality and integrity of the intervention as conceived by the developers.\* In transformative evaluation, we look at both whether the content was delivered as planned, AND whether the way it was delivered upholds the integrity of the ‘spirit’ or core values/principles of the work. In other words, we examine fidelity of the ‘what’ (content) and ‘how’ (process).*

Preparation	Y	S	N	N/A	Notes & Examples
Needs and priorities of participants identified and integrated into process design and planning					
<b>Intention:</b> what was the intention leading to this training					
<b>Attention:</b> how do people feel attended to; part of the social anatomy of meridians...					
<b>Fostering trust</b> in preparation					
<b>CONTENT: Transformative Models/Maps, Epistemology</b> (theory of knowledge) & <b>Axiology</b> (study of the nature of value/worth)	Y	S	N	N/A	Notes & Examples
<b>Living systems</b> are used to foster <u>individual leadership</u> in <u>belonging</u> ,					

organizing, <u>d</u> ecolonizing, <u>h</u> ealth and interconnectedness					
<b>Living systems</b> are used to foster collective work in <u>b</u> elonging, <u>o</u> rganizing, <u>d</u> ecolonizing, <u>h</u> ealth and interconnectedness					
<b>Global indigenous models and practices</b> were used (e.g., Bodhi frame, story circles, living systems)					
Participants <b>learned the history</b> of systems of oppression (e.g., race/racism, colonization, how isms show up in HR / at work, etc.)					
Participants <b>learned biopsychosocial science of oppression</b> (e.g., polyvagal theory, nervous system, trauma and related behavior)					
Participants <b>learned to apply frames and maps</b> (e.g., social position groups / socialization; 4 types of oppression; prejudice vs. discrimination vs. oppression; agent/target group skills)					
Participants <b>examined culture, policy and power</b> (e.g., white supremacy culture vs. relational culture, HR rules, how power works in terms of social positionality and position within a hierarchy)					
<b>PROCESS: Racial Equity, Social Justice &amp; Belonging (RESJB) and Transformative Pedagogy (method of teaching), Practices &amp; Processes</b>	Y	S	N	N/A	
Facilitators engaged participants in <b>RESJB practices</b> (e.g., land acknowledgment, sharing pronouns, addressing different seating options to accommodate bodily differences, etc.)					

Learning was <b>tailored to diverse learning styles</b> / neurodiversity (e.g., auditory, visual, kinetic options)					
Multiple ways of engaging were offered to <b>foster interaction</b> (REVISIT THIS LIST e.g., personal reflection and journaling, pair shares, small group shares, large group discussions, interactive activities, creative expression)					
Multiple ways of engaging were offered to foster <b>belonging</b> (LIST HERE)					
Space was made with to hold <b>grief</b>					
Multiple ways of engaging were offered to <b>elevate voice</b> (LIST HERE)					
Facilitators model and guide the group in practicing “ <b>power with</b> ” vs. “power over/under”					
<b>Mindfulness</b> practices were <u>modeled by the facilitators</u> , such as noticing and naming sensations, emotions, or thoughts arising; compassionate, reflective and deep listening, etc.					
Participants were invited to <u>experience / participate in mindful practices</u> , such as breathwork, self-inquiry, compassionate listening					
*Participants were invited to participate in <b>creative learning practices</b> were used (e.g., visual arts-arts-based activities group activity, poetry, video, performance skits, song, etc.)					
<b>Relational practices</b> (e.g., group ritual, performance acting/skits, pair shares, small group dialogue group activities, etc.) were used					

<b>*Anti-racist / anti-oppressive practices</b> were used (e.g., rumbling with vulnerability, naming, working with and being accountable for the dynamics of social positionality)					
<b>Knowledge building</b> (understanding)					
<b>Skill building</b> (doing)					
<b>Dialogue at the levels of self, spirit and collective</b> (being)					
<b>Other transformative processes and practices</b> were used (e.g., collective visioning, identifying what we need to hospice, invitation to hold tensions)					
The <b>timing</b> was spacious, providing moments for individual reflection and meaningful connection					
<b>Trust was fostered</b> among participants during the sessions					
<p><b>PRAXIS: Using the Bodhi Frame<sup>1</sup> for reflection and action</b> (combines content and process)</p> <p>Facilitators engage participants in practices that embody the Bodhi frame as follows:</p>	Y	S	N	N/A	Notes & Examples
<b>Beloved:</b> what we love, hold sacred, want to protect, and what is interconnected					
<p><b>Bestill:</b> how we center, pause, reflect, rest, spend time with other living systems</p> <ul style="list-style-type: none"> <li>• <b>Concentration:</b> gathering, aiming, initially connecting</li> </ul>					
<ul style="list-style-type: none"> <li>• <b>Mindfulness:</b> practice being</li> </ul>					

<sup>1</sup> Sonali Sangeeta Balajee. Our Bodhi Project: <https://ourbodhiproject.squarespace.com/the-frame>.

without holding on, grasping; begin again					
<ul style="list-style-type: none"> <li>• <b>Compassion:</b> holding the whole, active not passive, being with, meditation into action</li> </ul>					
<b>Behold:</b> seeing clearly emotionally, politically, and spiritually, holding the whole; including making space for grief, joy and the continuum between					
<b>Believe:</b> interrupting and questioning our conditions, emphasizing multiple ways of knowing and being					
<b>Becoming:</b> building power via relationship while rooted in what is Beloved, letting go of what is not longer serving us collectively, choosing actions grounded in values, centering collective health while Becoming					
<b>Belonging, coliberation and wellbeing:</b> the outcomes we desire and the processes we stay accountable to along the way to achieve greater collective well-being					
<b>Key Strategies &amp; Activities</b>	<b>Y</b>	<b>S</b>	<b>N</b>	<b>N/A</b>	<b>Notes &amp; Examples</b>
Participants learn what it means to <b>lead with and center the voices of indigenous people and people of color</b>					
Participants plan / begin to <b>integrate the Embodying Belonging &amp; Coliberation Frame</b> into their work at the City of Seattle					
Participants <b>identify and practice</b> how to <b>take strategic actions to support RESJB in their relationships with people they supervise, manage and advise on HR matters.</b>					
Participants <b>identify and practice</b> how to					



take strategic actions to support RESJB in decision-making related to teams and workplace culture.					
Participants <b>identify and practice</b> how to take strategic actions to support RESJB in project planning and policy development and implementation.					
Participants identify <b>struggles &amp; praxis antidotes</b>					
Participants identify and foster <b>life-sustaining actions and beliefs</b> etc.: <ul style="list-style-type: none"> <li>● Living systems-centered</li> <li>● Channels and relationships</li> <li>● The whole/circulation</li> <li>● Teams/leadership</li> <li>● Spirit</li> <li>● Processes</li> </ul>					
Participants identify <b>patterns and symptoms of harm</b> : <ul style="list-style-type: none"> <li>● Living system-centered</li> <li>● Channels and relationships</li> <li>● The whole</li> <li>● Teams/leadership</li> <li>● Spirit</li> <li>● Processes</li> </ul>					
Other: _____					

Additional notes about Fidelity: \_\_\_\_\_

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\_\_\_\_\_

**Reach:** *The proportion of intended target audience that participates in an intervention, or each component of an intervention.\**

Provide notes about **apparent reach and diversity** of participants in the training, such as races/ethnicity, gender identity, sexual orientation, , economic class, ability, national origin, age, religion, etc. For example: “22 participants, 2 identified as using ‘they/them’ pronouns, 3 identified as indigenous people from the Duwamish Tribe and Clatskanie Nations, majority people of color, one person talked about a learning disability, another mentioned a hearing problem, represented diverse departments and levels within the organizational hierarchy”.

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Provide notes about **reasons for participating in the training and/or what participants hope to get out of the training...what called them there**, if mentioned:

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**Participant Experience:** *Indications of how the program is being received by participants, and possibly other stakeholder groups.\**

Participation	Y	S	N	N/A	Notes & Examples
All participants engaged in / were open to:					
The learning activities offered					
Individual reflection activities					
Small group activities					
Large group activities					
Dialogue at the level of self, spirit, and collective (being)					
Arts-integrated activities (visual art, performance, song, etc.)					
Mindfulness activities					
Knowledge building activities (understanding)					
Skill building activities (doing)					

Additional observation notes, including changes in levels of engagement over time and participant comments about their experiences in the training, including characteristics of facilitators and students in the program:

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\*Content derived from Linnan L, Steckler Process Evaluation for Public Health Interventions and Research: An Overview. San Francisco, CA: Jossey-Bass/John Wiley & Sons, Inc., 2002. Print.