

Modeling Case Conceptualization

A Teaching Approach to Intergenerational Trauma

As CACREP continues to advocate for more effective instruction on trauma-informed care to counselors-in-training (CITs), counselor educators ought to integrate the impact of intergenerational trauma (IGT) into counselor education. Counselors may overlook contributing factors outside of individual influences, therefore feeling unprepared to address ecological components associated with IGT. Additionally, there is limited research on how to best teach IGT within counselor education. In this teaching brief, we propose the modeling of IGT-focused case conceptualization by faculty members within a counseling program. We include suggestions on how to integrate modeling into the curriculum and discuss assessments to measure the impact of modeling on counseling students.

AKYLA JOSEPH & TAYLOR NOLAN

Department of Graduate Psychology, James
Madison University

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Correspondence concerning this article should be directed to
Taylor Nolan. Email: nolantl@dukes.jmu.edu

Introduction

Mental health counselors are called by the *ACA Code of Ethics* to guide effective practice and support clients' growth and development (American Counseling Association, 2014). For example, the *ACA Code of Ethics* requires counselors who are appropriately trained to meet the needs of clients. Although the Council for Accreditation of Counseling and Related Education Programs (CACREP) has made strides to include standards related to trauma, there is a continued need for improvement in effective teaching on addressing trauma within counseling sessions (CACREP, 2024; Felter et al. 2022; Modeste-James et al., 2024; Moh & Sperandio, 2022; Nelson, 2024). Most clients seeking counseling have experienced some form of trauma, with recent studies citing an estimate of more than 70% of individuals worldwide having exposure to trauma (Moh & Sperandio, 2022; VanAusdale & Swank, 2020). Further, we must recognize the impact that trauma has on individuals, including mental health problems, substance abuse, and relational issues (Moh & Sperandio, 2022). Acknowledging the prevalence of this issue, more research has recently been conducted on how to prepare counselors-in-training (CITs) for providing trauma-informed care, constituting a need for comprehensive trauma-informed education integrated into required counseling courses (VanAusdale & Swank, 2020).

A notable gap in trauma-informed care is intergenerational trauma (IGT), which can also be referred to as generational trauma, transgenerational trauma, or historical trauma (Isobel et al., 2021; Petion et al., 2023). IGT is defined as the transmission of unresolved trauma across generations, including the potential for this transmission to be epigenetic (Day & Shloim, 2021; McAllister et al., 2024). IGT is often considered from a historical or cultural context (Henderson et al., 2021; Sharma et al., 2023). Some examples include adversity experienced by children of Holocaust survivors, Indigenous Peoples and residential schools, and the impact of slavery within the African American community (Isobel et al., 2021; McAllister et al., 2024; Petion et al., 2023; Sharma et al., 2023). However, individual experiences of traumatic events can also be transmitted to future generations (Sharma et al., 2023). Beyond mental health symptoms like anxiety and relational difficulties (McAllister et al., 2024; Moh & Sperandio, 2022), IGT is linked to health disparities, though healing can also be passed across generations (Henderson et al., 2021).

RATIONALE FOR INSTRUCTIONAL ACTIVITY

The need for training and education of trauma has been established through CACREP foundational curriculum standards, such as: 3.B.4, the effects of historical events, multigenerational trauma, and current issues on diverse cultural groups in the U.S. and globally; 3.C.14, effects of crises, disasters, stress, grief, and trauma across the lifespan; 3.D.2, approaches for conceptualizing the interrelationships among and between work, socioeconomic standing, wellness, disability, trauma, relationships, and other life roles and factors; 3.E.20, crisis intervention, trauma-

informed, community-based, and disaster mental health strategies; and 3.G.14, procedures for assessing clients' experience of trauma (CACREP, 2024). Yet counselors often leave programs feeling unprepared to competently work with clients presenting with various trauma experiences (Moh & Sperandio, 2022; VanAusdale & Swank, 2020). Barriers to effectively teaching CITs arise when instruction emphasizes the science of trauma over the clinical skills required to support clients, often reflecting educators' limited experience in the field (Moh & Sperandio, 2022; VanAusdale & Swank, 2020). Research on IGT is minimal, and understanding how to teach this concept to CITs is even more limited despite its importance (Bray, 2023; Petion et al., 2023). Though some counselor educators may have explored intervention techniques to utilize in sessions to support clients with the exploration of IGT, no found research indicates how to teach CITs to understand the concept and integrate IGT into their theoretical approaches to counseling. In order to address the complexities of IGT, it is necessary to engage in culturally responsive strategies in response to systemic, sociocultural and historical traumas, like racism and oppression that occur in marginalized communities while acknowledging that these responses may be different than the Eastern or Euro-centric common practices (Modeste-James et al., 2024; Wright et al., 2023). Due to its ability to provide structure for integrating multiple components of a client's history and needs, case conceptualization should be considered a method for helping counseling students explore the complexity of IGT and incorporate these factors into treatment planning (Hinkle & Dean, 2017).

Case conceptualization is a well-known pedagogical component of the counselor education process, in which CITs learn how to collect, organize, and interpret information gathered from a case to develop an approach for effective counseling treatment (Cline et al., 2022; Hinkle & Dean, 2017; Sperry & Sperry, 2020). Case conceptualization can encourage counselors to develop treatment plans through various theoretical lenses (McTavish et al., 2024). Researchers also found that the effectiveness of treatment can correlate with the level of diligence in a case conceptualization (Hinkle & Dean, 2017). As counselors engage in in-depth reflection to further understand their clients' experiences, they may be more likely to adapt their clinical interventions to fit the client's needs and reduce the frequency of misdiagnosis. Lack of awareness and exploration of IGT by counselors can contribute to mislabeling the symptoms displayed by clients (Isobel et al., 2021; McAllister et al., 2024; Petion et al., 2023). Understanding the intricate layers that constitute IGT may require counselors to engage in more complex cognition, and case conceptualization is one pedagogical approach counselor educators can use to develop this skill within CITs (Cline et al., 2022; Hinkle & Dean, 2017). Further, through case conceptualization, counselors can reduce pathologizing based on culturally normative behaviors by assessing how cultural identity has been shaped through culturally and familial histories (Day & Shloim, 2021).

There are various strategies for teaching case conceptualization, though research on the most effective methods remains limited (Cline et al., 2022). Methods include following an eight-step framework (Sperry & Sperry, 2020), student role play or drama therapy (Hinkle & Dean, 2017), case-based workshops (Cline et al., 2022), and the use of fictional or online simulations. We propose a framework for faculty modeling of case conceptualization within first-year counseling courses, considering that CITs' developmental stage influences their

ability to conceptualize and that the cognitive complexity required is still developing (Hinkle & Dean, 2017).

Grounded in experiential learning theory (Kolb, 1984), case conceptualizations allow students to engage with a client experience through a written narrative, reflect on that situation from multiple perspectives, integrate prior and newly acquired knowledge to think abstractly, and actively develop a potential treatment plan to support the client. Social constructivist theory (Vygotsky, 1978) further informs this approach by emphasizing the importance of social interaction, such as students' observations of faculty and their participation in class discussions, as well as the role of cultural factors in knowledge development, which can include an awareness of intergenerational trauma. From this perspective, modeling by faculty members is a valuable learning tool, as observing expert practices can support students' cognitive growth and their navigation of diverse client experiences. Together, these theories suggest that learning can be strengthened through the integration of modeling and case conceptualization. Through modeling, the counselor educators can scaffold information needed in case conceptualization, preparing them to actively engage in their own learning process and implement new skills in their own practice. Given the gaps in trauma training, this teaching brief proposes a unique approach to addressing the complexity of intergenerational trauma (IGT) through faculty modeling of case conceptualization.

Description of Instructional Strategy

We recommend that counselor educators use the instructional strategy of modeling case conceptualization as a precursor to students conceptualizing independently to address IGT in case studies during the first year of a master's-level counselor education program in the lifespan development course. The activity would address section 3.C.11, "systemic, cultural, and environmental factors that affect lifespan development, functioning, behavior, resilience, and overall wellness," and 3.C.13, "effects of crises, disasters, stress, grief, and trauma across the lifespan," within the lifespan development standard, and 3.E.1, "case conceptualization skills using a variety of models and approaches," and 3.E.13, "developmentally relevant and culturally sustaining counseling treatment or intervention plans," within the counseling practice and relationships standard (CACREP, 2024).

To do so, CITs engage in an educational session where their professors introduce a case study with facets of IGT, including historical trauma (e.g., war, forced migration), societal traumas (e.g., racism, poverty), and personal experience (e.g., addiction, violence) incorporated. Throughout this lesson, counselor educators ought to model frameworks of case conceptualization within the case study, promoting the scaffolding of students' new learning of IGT and case conceptualization together. Students then independently complete a case conceptualization of a new case using the previously modeled techniques in the lesson and throughout their previous learning. In this way, students demonstrate their cognitive complexity and critical

thinking developed, as well as their understanding of clinically supporting clients with IGT. The instructional strategy is meant to be built upon and used in both the fall and spring semesters but could be carried into subsequent years of the counseling degree program if desired. Faculty can be given a list of sample case studies they can choose from that coincide with the topic of the week, and these sample case studies will also include details about personal, familial, historical, and societal factors to facilitate conversations about intergenerational experiences with mental health, with a focus on the CACREP (2024) 3.B.4, 3.B.6 and 3.C.11 standards.

APPLICATION TO COUNSELOR EDUCATION

Within counselor education, experiential learning offers CITs ways to enhance their cognitive complexity in several ways. Utilization of case conceptualization as a part of the learning process of IGT provides an opportunity to apply theory to practice while integrating concepts of trauma-informed counseling to diagnosis and treatment planning. Through the modeled case study and conceptualization, students are provided with the scaffolding of material that will support the development of their own conceptualization. For example, the engagement in this process allows counselor educators to model vulnerability in navigating challenges and provide feedback and reflection on student processing. Additionally, providing ample experiences for CITs to gain exposure to experienced clinicians utilizing case conceptualization can help enhance students' clinical skills as they prepare for their first professional experiences. Furthermore, representations of clinical thinking and decision-making may be offered throughout educational programming by seeing various faculty members approach conceptualizing a case with general information and modeling how to engage in more complex cognition.

ETHICAL CONSIDERATIONS AND REFLEXIVITY

Through the application of case conceptualization of case studies of IGT, it is important to implement pedagogical theories that support students in navigating these complex topics. When teaching using a trauma-informed pedagogy (Moh & Sperandio, 2022), educators must recognize that students may have shared experiences similar to those depicted in the IGT case studies and may be at risk for retraumatization. Additionally, all students could experience secondary traumatization through these discussions and exercises (Carello & Butler, 2014; Kim et al., 2024). Engaging in the key principles of trauma-informed pedagogy can minimize these risks to students by creating a safe and respectful classroom environment and promoting collaboration, empowerment and cultural care (Kim et al., 2024). We recommend that faculty educate themselves on understanding trauma, develop a plan to minimize risks, and have resources available for students who need it (Carello & Butler, 2014).

It is critical that counselor educators maintain awareness of vulnerability in the classroom while modeling how to navigate personal biases during case conceptualization in order to encourage CITs to consider what symptoms we identify as individual issues for some populations compared to systematic issues for others. It is also important for counselor

educators to be mindful of the language used when providing diverse case study examples. Counselors should recognize that IGT can affect all people in different ways, even folks with different levels of privilege or cultural backgrounds (Bray, 2023). When addressing IGT, there is an inherent involvement of systemic issues, which promotes a need for advocacy on a community level, not only individual changes in session. Counselors hold a responsibility to advocate for their clients' needs and to address those needs at the multiple levels in which clients are impacted.

We, the authors of this brief, are graduate students in a doctoral counselor educator program and practice as licensed mental health professionals. In our clinical work, we have worked with underserved populations impacted by stigma when trying to access healthcare resources. Through our work in various settings, such as inpatient hospitals, partial hospitalization, substance use facilities, in-home services, and universities, we have worked with clients with complex trauma and recognize the interconnectedness between a client's individual issues and systemic barriers to well-being. With these experiences, we have been exposed to the impact of IGT within our clients and noticed that providers often do not feel equipped to effectively identify and address these issues, resulting in clients cycling through services. We have implemented trauma-informed pedagogical methods in courses taught, including crisis intervention and multicultural counseling. It is with understanding and care that we recognize the multitude of experiences, situations, and systemic influences with which students enter into the classroom.

SUGGESTED RESOURCES FOR IMPLEMENTATION

To protect both students' and faculty members' well-being, we recommend using a trauma-informed approach when engaging the case modeling activity, such as Harris & Fallot's (2001) trauma-informed care approach. Following Choudhuri's (2019) suggestions on how to utilize this model, faculty can maintain a trauma-informed approach by first providing clear guidelines and content warnings about the sensitive nature of the material. Since students will be working from a provided sample case, they can emphasize that no personal disclosures are required, which helps maintain emotional safety. They also ought to incorporate grounding techniques or brief mindfulness exercises before and after the activity to help students regulate emotions and stay within their Window of Tolerance (Siegel, 1999). Finally, counselor educators should normalize and validate any discomfort that arises during discussion, encourage check-ins, and model professional boundaries to create a safe and supportive learning environment.

For generating sample case studies, the use of artificial intelligence (AI) might be a useful tool for educators. AI can be a helpful resource for counselor educators to gather a range of examples for classes. However, it is important to note that any work produced by AI should be reviewed and edited, as its use in the counseling field is still novel and may have errors that would not be helpful for students. Next, we have included the prompt we used with AI to develop case studies and the unedited version of the case example produced. Educators should be transparent with students that the case studies they are utilizing have been developed with support of AI. It is especially critical that counselor educators make

sure to note any potential cultural biases or stereotypes in produced case studies. This step is especially important because we recommend that counselor educators employ culturally diverse case studies to enrich students' learning and understanding of IGT through various communities and intersecting identities.

Additionally, students would benefit from having the activity conducted by at least two different professors in each semester so that students can be exposed to different perspectives on navigating case conceptualization. Faculty members can be given a template, such as Sperry and Sperry's (2020) eight P's or the cultural framework of generational trauma (Sharma et al., 2023), for which topics to include in the final organization of the case conceptualization. We recommend that the template modeled by faculty is the same one given to students to use for other case conceptualization assignments throughout the program. Please note that the table in the example below is filled out only to demonstrate what a faculty member might identify based on the case. During the exercise, the faculty member would use a blank template and model how to complete it. Students are then given their own blank template to complete.

Case Study and Conceptualization Structure Example

AI Prompt given to ChatGPT: Create a case study illustrating intergenerational trauma to be used for a developmental counseling course. Use Sperry and Sperry's (2020) eight P's as the structure for the case conceptualization and include 3 processing questions to encourage critical thinking:

Case Study

Sofia Ramirez, a 16-year-old, Mexican American high school junior, was referred to counseling after panic attacks, nightmares, and a sharp academic decline. Once engaged with peers and schoolwork, she has become withdrawn and fatigued, often missing class. She lives with her mother, Ana, who works long hours as a home health aide and tends to avoid emotional conversations, and her grandmother, Maria, who fled violence in Mexico during the 1980s. Maria frequently reminds Sofia that their family has "survived worse" and stresses the need to be strong, while rarely acknowledging emotional pain. Sofia's father was deported when she was 10, creating ongoing instability and loss. Although Sofia expresses a strong desire to succeed, she feels guilty for wanting a different life than her family's hardships and often minimizes her struggles by comparing them to her grandmother's suffering. Her recurring nightmares of separation and danger, coupled with strained family communication, highlight the weight of intergenerational trauma. Survival narratives, silence around emotions, and unprocessed historical stressors contribute to Sofia's anxiety and difficulties in identity development.

Questions:

- How might Sofia's experiences of anxiety and guilt be connected to intergenerational patterns of trauma, resilience, and silence within her family?
- What protective factors can you identify in Sofia's life, and how might these be leveraged in treatment planning?

- How could cultural values, family dynamics, and systemic factors (e.g., deportation, economic stress) be considered when conceptualizing this case?

Table 1

Case Conceptualization Structure using Sperry and Sperry's (2020) eight P's

Domain	Case Application
Presentation	Panic attacks, nightmares, anxiety, academic decline, withdrawal, fatigue, strained family communication.
Predisposition	Family trauma history, father's deportation, cultural norms of silence, poverty, limited emotional expression.
Precipitants	Recent school stress, academic struggles, limited parental availability, reminders of past losses.
Protective Factors	Motivation to succeed, prior academic strengths, access to school counseling, extended family presence.
Pattern	Emotion suppression, self-blame, minimizing distress, conflict between family expectations and personal goals.
Perpetuants	"Be strong" messages, emotional avoidance in family, ongoing stressors, lack of open communication.
Plan	School counseling, family involvement, trauma-informed and culturally responsive therapy, anxiety-management skills.
Prognosis	With help: improved coping and academics; without help: worsening anxiety and continued withdrawal.

Evaluation of Effectiveness of Instructional Strategy

The goals of this instructional strategy are twofold: (1) to support CITs in identifying and addressing the impact of IGT and demonstrate effectiveness in case conceptualization according to their level of training, and (2) to cultivate in CITs the ability to recognize IGT within the context of a case study and future clients. Our instructional activity aims to increase student competency in both trauma-informed treatment and multicultural awareness in counseling. To impactfully address the effects of IGT, a counselor must show competence in both areas. The use of case conceptualization has been shown to be an effective tool in the development of counselors to address the treatment planning needs of clients (Cline et al., 2022; Hinkle & Dean, 2017). Mastering the art of case conceptualization takes practice, reflection, and feedback. By starting this skill early in the counselor's education process, CITs can embrace subsequent opportunities for growth in the comprehension and application of conceptualizing. This instructional strategy can continue to be utilized throughout training, as it can be modified to grow with the CIT's developmental level. In doing so, CITs can increase their knowledge of IGT and apply this through their learning of case conceptualization.

Assessment Tools/Methods Used in Instructional Strategy to Assess Student Learning

Within the instructional strategy, students will be provided with a rubric, which outlines criteria for both the technical aspects of the case conceptualization as well as the integration of IGT throughout the conceptualization (see Appendix A). This rubric will be utilized by educators to assess understanding of IGT concepts and application of conceptual practices based on the developmental training level of the CIT.

Additionally, students ought to reflect on their case conceptualization process. This reflection allows them to identify areas for growth without concern for grading impact. Students are encouraged to provide honest, reflective responses regarding their confidence levels, challenges encountered, and areas where they seek further development. They will also address how having the case conceptualization modeled for them prior to completing their assignment informed their learning process.

Implications

This instructional activity aims to address the need to better prepare CITs for clinical work with clients who have experienced trauma. Although CACREP standards have implemented criteria to address trauma in foundational curriculum, some CITs leave their programs unprepared to identify and address the treatment of trauma in clients (Nelson, 2024). Through the education on IGT, CITs gain knowledge and competence of both trauma and its symptomology as well as the systematic, historical, and cultural contexts in which trauma has impacted populations. By modeling and practicing case conceptualization, CITs gain experience in recognizing trauma and applying treatment planning strategies in context. Developing these skills is essential for CITs as they enter the field, particularly when working with clients whose trauma may have been previously overlooked due to gaps in provider training.

UNANSWERED QUESTIONS AND LIMITATIONS

As this strategy has yet to be utilized in a classroom setting, it is difficult to address its effectiveness. Once applied, we recommend that counselor educators assess learning outcomes through student assignments; however, follow-up data on its long-term impact for CITs working with clients with similar experiences may not be available. Accordingly, there is a need for counselor educators to design studies that analyze these data to determine

the impact of these instructional activities and strategies on clients. Future Directions for Practice and Research

Future research could explore how this instructional strategy can be integrated into the overall curriculum, allowing students to engage with IGT concepts at multiple stages of their professional development, including practicum and internship. This research would provide opportunities for students to apply foundational knowledge from early fictional case studies to real clients they work with in person. Additionally, as CITs progress throughout their program, providing them opportunities to build on their conceptualization skills as well as implement knowledge of trauma-informed strategies can support continued growth. We further recommend that counselor educators implement variations of case conceptualization teaching. They can do so using researched methods like case conceptualization workshops (Cline et al., 2022) and the student role play/drama therapy (Hinkle & Dean, 2017). The collective utilization of these teaching methods can provide a practical framework for preparing CITs to effectively address trauma when working with future clients.

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Appendix A

Conceptual Framework and Processing Rubric

Criteria	3 – Meets Expectations	2 – Approaching	1 – Does Not Meet
Lifespan, Context, & Trauma (CACREP 3.C.11, 3.C.13)	Integrates systemic, cultural, and environmental factors with development, trauma, and resilience.	Factors identified; connections limited or unclear.	Factors missing, inaccurate, or unconnected.
Intergenerational Trauma (CACREP 3.C.13)	Clearly identifies IGT patterns using historical/cultural context.	IGT identified with limited depth or context.	IGT not identified or misinterpreted.
Case Conceptualization Framework (CACREP 3.E.1)	Uses clear framework (e.g., Eight P's); organized and complete.	Framework present but incomplete or unclear.	No clear framework or organization.
Treatment Planning & Cultural Responsiveness (CACREP 3.E.13)	Developmentally appropriate, culturally sustaining interventions with rationale.	Interventions noted; rationale or cultural fit limited.	Interventions inappropriate, missing, or culturally insensitive.
Clinical Reasoning	Integrates client data, theory, and context to justify decisions.	Partial integration; reasoning incomplete.	Minimal or unsupported reasoning.
Professional Communication	Clear, organized, professional counseling language.	Generally clear; minor issues.	Unclear, disorganized, or unprofessional.

Performance Levels: Excellent (16–18) | Proficient (13–15) | Developing (10–12) | Needs Improvement (<10)

Note. IGT = intergenerational trauma. CACREP standards included for instructional alignment.