HCP-C

MODULE 3

Planning, Partnering and Leadership

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OVERVIEW

This module concentrates on the front end work that needs to happen to successfully build and implement a housing stabilization strategy that is the most likely to be effective for your context. The idea of providing integrated mental health supports, case management, and peer support through processes and in spaces that optimize engagement might seem fairly straight forward on the surface. In our experience, however, getting it right requires a good deal of care and foresight in establishing the leadership and partnership models, communications, and other process pieces that are essential to (i) fulfilling the goal of each program element informing and supporting the others, and (ii) ensuring a healthy and sustainable work environment in which everyone's contribution is maximized.

If we might take an example from research into psychotherapy, the "common factors" such as forming a good working alliance, alignment on goals, effective communications, etc. can have as much as or even more of an impact on outcomes as the specific therapy provided (e.g., CBT).

This module is designed to help you establish the common factors of your housing stabilization effort. After having worked through this module with your collaborators you should have built the foundation for your housing stabilization strategy and be ready to start hiring staff and getting going in earnest.

The key takeaways from this section are:

1. **Clearly identifying and defining the local service gap that your housing stabilization approach will address**. This requires good knowledge of youth needs, sector knowledge, and practice knowledge and may take some care to ensure that in this early stage you have the right people engaged and enough information on hand. If mistakes are made here there is a risk of wasting resources, misaligned services, and missing key partners.
2. Once the service gap is understood and the right people are working with you, you can move on to **further articulating the specific problem that you hope to solve and the specific group(s) of youth for whom the problem needs addressing**. This will flow into some early drafting of the intervention components and collaborations that will be needed to address the transitioning challenge that is the focus. This work will form the rough outline of a proposal that would be brought to your stakeholders.
3. **Holding stakeholder engagement sessions that bring together people from across your sector in a variety of roles**, including youth and policy maker involvement.
4. **Identifying and developing the collaboration that will deliver the stabilization intervention**. This work will include articulating roles and processes, developing relationships, and coming to consensus on your collective theory of change for this work.
5. **Providing your team with the necessary teachings and tools needed to engage with the targeted youth and their particular needs.** For instance, supporting service

providers with a cultural framework and the historical context needed to successfully engage with Indigenous youth, including an understanding of how these youth may engage with the services offered to them based on past experiences.

6. While necessary throughout this process, it is at this stage that your group will be in the ideal position to **engage in resource generation as very clearly articulated approaches for specific challenges**, grounded in a well-organized collaboration, are far more likely to be funded.
7. This is also the stage where it is **helpful to engage in a systematic analysis for blind spots in the plan and under-representation in your group**.
8. Other tools that we provide here include a structure for generating the rigorous communications strategy (Worksheet 7) and role articulation (Worksheet 6) that is essential to support complex interventions with multiple collaborators. We also provide here a tool that can assist with plotting out key activities over time (Worksheet 8).

1. Identifying the Gap in Service

This task is less one that is done at the beginning and the box is ticked – it is more about starting a process of continuous exploration and evaluation. While it can be generally agreed in nearly all systems that youth require some additional supports in major life domains after securing housing, there is a lot of variability in terms of the specifics. This variability can include:

- Specific youth needs which can vary with, for example, geographic and cultural considerations.
- A range of possible collaborators – varying in collaborator type and possible number.
- Positioning in a given system which will be unique in terms of strengths and weaknesses.

Most endeavors, of course, start without everyone at the table who will ultimately need to be there. Usually an individual or small group of individuals and organizations start a conversation about a gap in services and the opportunity to do better as a system that strives to support young people exiting homelessness permanently. Below we map out a process to help guide those engaged in this pre-planning stage – helping with the process of preparing to reach out to possible collaborators and funders. We hope to leave you better prepared to engage and reduce the risk of potential partners and funders walking away due to a lack of clarity and time wasted on 'blue sky' meetings and conversations that are having a hard time becoming focused.

2. Planning the Partnership

Having completed the important work of drafting the tertiary prevention/housing stabilization model with the input from your community partners, you are ready to begin to identify your collaborators. Again, this is likely not a single step – more the start of a process that might see you gaining and losing partners over time.

Likely the best starting point is to think through possible collaborators as they line up with the intervention components/interventions that are needed. In our experience, these components are likely to include attention to mental health, case management, and peer support domains among others. As well, continued thought is needed as to who the lead or backbone organization is going to be. We are not proposing a hierarchical model here, but even in collaborations wherein power is distributed equally, one group or organization probably needs to organize – even if this responsibility rotates.

Finally, space and geographic considerations will be important. Youth who have exited homelessness generally don't want to receive services in homeless-serving spaces. The geographic dispersion of services is another consideration. Staff and youth leaders need to meet, in person, regularly, and do outreach effectively. Highly dispersed collaborating organizations may pose a challenge, as might challenges such as youth having to move through dangerous parts of cities to access services.

For each intervention component, the following template might be helpful:

- Component area to be addressed
- Organization name
- Contact(s) in leadership roles
- Expertise in component area (track record of experience and success, knowledge and skill base)
- Capacity to deliver (human resources, in kind support, facilities and infrastructure, ability to sustain collaborative involvement over time)
- Potential to build capacity (prominence in the field, connections with decision makers, success with funding)
- Quality of collaboration (history of past collaborations – successes and challenges):
- Potential risks re: collaborating with this organization
- Potential risks of not collaborating with this organization

Once the group of prospective collaborating organizations have been identified, it will be a helpful exercise to look at them all, against the youth needs that you identified as they relate to transitions out of homelessness, to see if there remain any gaps that any one organization or the collaboration as a whole cannot address. This might lead to considering other possible partners. As well, you might consider more than one collaborating organization for a single function. This can reduce the burden on any one organization (and mitigate the problem of one organization having to back out), increase the pool and diversity of the youth engaged, and lead to capitalizing on the strength of different perspectives on a particular facet of the work. Thinking this through, though, will require thought given to staging and scale – some questions that might not yet have answers. Some considerations too will be political. When in doubt it may prove easiest to start with a smaller group and, as more information is gathered, consider bringing on additional collaborators.

It is also important to note that all parts of the collaboration might not necessarily be organizations. For example, youth leaders/peers may need to be brought on – and may come through several organizations or may need an organization to create the platform to support their involvement (see Module 6 – Peer Support). Many if not all collaborations will benefit from having one or more elders participate in the planning and leadership process – individuals who may or may not be engaged with a partnering organization. The same might be said for decision maker partners. Indeed, some planning processes might approach this from a levels of involvement perspective – with a layer of core collaborators, and layers of more distant collaborators and advisors who support the work but are not directly involved in day-to-day service provision.

3. Needs Brainstorming

In this sub-section you are being asked to reflect as a group on what you think are the main needs/barriers of the individuals being targeted through this intervention. Remember, this should be done with people who have thorough knowledge of the target group based on life and work experience. Below we provide a checklist to help with brainstorming, but note the list is not comprehensive by any means. Star the needs/barriers that are anticipated to be most relevant to the target group.

For each item on the list – particularly those with a star – discuss as a group how those needs are being supported through the components of the intervention and identify gaps.

Need	Priority
☐ Mental health disability	
☐ Physical disability	
☐ Developmental, cognitive, learning disabilities	
☐ Inadequate resources to cover monthly expenses	
☐ Food insecurity	
☐ Life skills gaps	
☐ Criminal records/criminal justice involvement	
☐ Social barriers/Anxiety	
☐ Clothing	
☐ Transportation	
☐ Lack of basic furniture/home supplies	
☐ Inadequate/unsafe housing	
☐ Violence/victimization/fear	
☐ Cultural disconnection	
☐ Other:	

WORKSHEET 1

Identifying the Gap

This worksheet helps in making sure you have who you need on the early planning working group.

Before moving on to begin the early stage planning and scoping, it is helpful to have a short review of who is working on these beginning pieces. That is best done by looking at requirements before considering people who might fulfil them. This early stage will require:

- ☑ A good knowledge of the needs and experiences of youth homelessness in your sector.
- ☑ A good knowledge of the sector itself – who is providing what and who has respect and influence in the sector.
- ☑ The ability to effectively find out information both within the service sector and in the broader field and literature – to help fill in the gaps.

At this early stage ask yourself and your group if you have these three areas covered. This step is not about establishing the collaboration – try to be clear about that. This is about establishing the group that will establish the collaboration. It is likely best kept small initially so that people don't feel like an actual collaboration has started that they haven't been invited to.

As a small group have a conversation about this step:

1. *Do we have a good knowledge of the needs and experiences of youth homelessness in our sector?*
   Yes, and Person 1 and Person 2 are on point for it.
   No, we need more experience here and Person 1 and Person 2 can help.
2. *Do we have a good knowledge of the sector itself – who is providing what and who has respect and influence in the sector?*
   Yes, and Person 1 and Person 2 are on point for it.
   No, we need more experience here and Person 1 and Person 2 can help.
3. *The ability to effectively find out information both within the service sector and in the broader field and literature – to help fill in the gaps.*
   Yes, and Person 1 and Person 2 are on point for it.
   No, we need more experience here and Person 1 and Person 2 can help.
4. *Is one or more of the above a young person with lived experience?*
   If not, you better figure that out!

Next, it can be helpful to think through what you hope to achieve at the end of this initial stage. We suggest that you might want to think about starting to articulate objectives like:

- ☑ Clearly articulating the problem that you want to solve. There is evidence that the more focused, specific, and clear you are in articulating the problem, the more likely your effort will be to succeed.
- ☑ Defining the specific group or groups of young people that will be the focus of this effort. Again, specificity is very important. One approach cannot be effective for all marginalized youth. Lack of clarity here will likewise cause many problems down the road.
- ☑ Determining what are the existing resources that address the specific problem for the youth that are the focus. Every effort must be made in this resource-starved context to **avoid duplication**. Resources can include specific interventions (e.g., mental health, case management, etc.) and, common factor considerations such as existing networks, collaborations, other interventions already being done in a related area onto which your effort might be added. Again, efficiency is everything in the effort to engage collaborators and funders, keep the approach clear for the youth and families who engage, and to not unnecessarily take resource out of a sector where it might otherwise have been deployed in a non-redundant area.
- ☑ Determining, based on points 1-3 above, what the components (e.g., mental health, case management, peer support) of your housing stabilization approach will be – what you will need to provide as a new resource and what can be provided by a collaborator working with you (at least a first draft).
- ☑ Determining the specific interventions that address the components in point 4 – attending carefully to the available evidence, cultural relevance, feasibility (can it be done?) and viability (can it be sustained?) in your system.
- ☑ Beginning to articulate possible funding routes for net new activities and what might be covered in kind by partnering organizations – this taps point 3 above.

Now that you have some draft objectives in mind, you can start to think through how those objectives will be best met in your service system. First, as a small group, there might be some benefit in starting to generate a draft working document that captures your own ideas regarding the above points – perhaps framing those objectives as questions to yourselves. Second, there can be a good deal of benefit to organizing a scoping meeting/event to pose those questions to your stakeholders. This second step has many benefits, including:

- Getting good information from multiple perspectives.
- Leaving other stakeholders in your system feeling respected and engaged.
- Starting the process of early identification of possible collaborators.
- Starting the process of thinking through staging and resourcing.

WORKSHEET 2

Identifying Stakeholder Groups

What stakeholder groups in our community need to attend?

- ☐ Policy makers
- ☐ Service leadership
- ☐ Direct service providers
- ☐ Youth currently or formerly experiencing homelessness
- ☐ Family
- ☐ Cultural leaders
- ☐ Academics
- ☐ Other:

Next, a list can be generated for who, locally, will be invited from each group. Some considerations that will be relevant for this stage include:

1. **Crafting the invitations** – thinking about how you will identify yourselves, this initiative, and its objectives.
2. **Finding a space conducive to comfort and engagement** – ideally one that readily allows for breakout sessions/conversations.
3. **Drafting an agenda**. This will ideally involve some youth co-facilitation, a land acknowledgement, and possibly some introductory remarks by a leader in the field and/or policy maker.
4. **Planning to ensure that youth who take part in the meeting can do so safely and effectively.** Considerations should include inviting as a small group rather than just one or two, some pre-meeting orientation to the goals of the meeting, the agenda, and brainstorming about how they can safely and effectively participate and be heard, attending to meaningful participation through the agenda (see below), fidget items at tables (things to draw on and play with), and financial compensation for their time.
5. There are many ways to run effective meetings like this – ways that need to **address local context and cultures**. Key considerations could include, after some preliminary orientation, a series of breakouts and large group discussions that attend to the objectives outlined earlier. Thought needs to be given to diversity in breakouts by stakeholder groups or having groups meet with their peers – there are pros and cons to each approach. Likely at least one youth-specific breakout is needed. In advance, the best way for youth to report back should be discussed with the youth participants – gauging format and comfort level.
6. **Make good use of multiple note takers and evaluate the event** – allowing for additional comments on evaluation forms.

Hopefully this meeting served the goals of gathering excellent information, seeding the beginnings of relationships that might turn into collaborations, and leaving all of the relevant stakeholders feeling involved and respected.

As a planning group, your next task is to take all of this information and draft out the following document:

1. What is the problem that we need to solve?
2. Who are the young people who will be the focus of this effort?
3. What are the existing resources that address the specific problem for the youth that are the focus?
4. What are the components of the housing stabilization approach that we need to build?
5. What specific interventions address each component?
6. What new and in-kind resources are needed?

WORKSHEET 3 & 4

Visualizing the Collaboration and Resource Planning

The next step will involve bringing the identified collaborators together to begin the process of drafting out a plan to get started. Examples of objectives for these initial meetings are listed below along with possible methods for exploring each area.

Full group introduction: Sharing all of the work done to date with the group and getting feedback on the planning process.

Collaborators are each asked to prepare a mini-presentation for the whole group

For each collaborator, articulating (in draft format) organizational and individual objectives for participating, degree and type of interest in participating, and fine tuning roles. This will no doubt have to be a dynamic process of representatives going back to home organizations for internal discussions to be sure that what they are representing align with staff, leadership, and board understandings of how they might participate.

Small group work with homework assigned

Identifying where further connection and information is needed. This may involve searches of the practice and academic literatures, reaching out to coalitions (e.g., A Way Home Canada), bringing on additional advisors and collaborators.

Breakouts for logic model section exploration and whole group to finalize

Engaging in a logic modelling or theory of change exercise that helps to break out short, medium and long term goals and activities. There are many sources of support on how to develop logic models. As an activity it is a useful tool to focus planning discussions and stage activities – indeed many funders require or otherwise like to see logic models within proposals. Appended below is the HOP-C logic model – this may be helpful for a point of reference.

Whole group

Developing a clear work plan with objectives and timeframes broken out – including specifics about the work that each individual and organization will contribute (at this stage focused largely on resourcing and planning). Formalizing meetings with minutes distributed can be very helpful with this process.

Breakouts

Coming up with a name (as with all names, ones with pithy and memorable acronyms help!). Youth leadership in this area will likely land on a more engaging and creative idea.

Whole group: Developing at least three versions of implementation – one very low cost, one middle, and one fully resourced. This will help with contingency planning and you will then be ready with versions that can suit specific audiences and opportunities. This will require doing some math – considering the numbers of youth engaged, the types and frequency of programming, and staff needs.

Whole group with homework

Clearly articulating the resource question. This will involve, for each of the implementation versions (low, medium, and large), resource models that include in-kind and cash (new resource) contributions.

Breakouts with review by the whole group

Developing messaging for various target groups (e.g., public, boards, funders, bureaucrats, decision makers) that clearly and succinctly identifies the collaboration and the problem to be solved, why this work is both feasible, viable, and important, and what is innovative. Lessons taken from successful organizations elsewhere suggest that there is great value in informing the media about the initiative and developing public (and by proxy government) awareness about the collaboration. See this example of public facing messaging in the form of a press release.

Ongoing

Relationship building. Given the depth of collaboration that is necessary for the success of this work, and the importance of effective youth engagement, through leisure and team building activities and meeting formats, time must be spent cultivating and testing relationships. This process may lead to some participants leaving and some new needs being identified as participants come to understand the relationship work that this type of collaboration will require.

Ongoing

Planning, writing and submitting grant proposals to support the work. This will involve research into potential funders, mapping out the feasibility of each prospect in terms of alignment, and noting deadlines/ timeframes. Planning collective efforts to engage in advocacy to secure funding – through engagement of decision makers, boards, the public, and philanthropists. From early on this effort must include a good deal of care taken on how the work is identified.

WORKSHEET 5

Inventory for Blind spots, Underrepresentation and Needs

By this stage a plan is starting to emerge and it's time to think about representation and expertise on the team. These questions are designed to help the team think through blind spots and areas of underrepresentation.

What is the anticipated profile of the young people in the intervention?

1. Cultural/racial/ethnic/Indigenous backgrounds?
2. Gender identity?
3. Sexuality?
4. Age?
5. Socio-economic background?
6. Geography/neighbourhoods?
7. Ability?
8. Key elements of lived experience (substance abuse, experience with child protection, criminal justice involvement, etc.)?

HOP-C North

When implementing HOPC in Northwestern Ontario, considerations were needed in order to best support the unique needs of Indigenous youth experiencing homelessness. This included considering how cultural teachings and access to Elders would coincide with the other wrap-around supports. The staff chosen to work in case management and mental health were those who identified as Indigenous and/or those who had a strong understanding of the various ways the effects of colonization and intergenerational trauma may be associated with the homelessness and mental health difficulties the youth are facing.

How does this profile match with the composition of the team and the structure of the program?

- Team:
- Structure of the program:

Ideally, the participant profiles should be reflected in the programming and the team, but we know that's not always possible.

What gaps do you see? Here are some strategies to consider as you reflect on any gaps:

Team

If there is hiring to be done, how can you use that as an opportunity to address gaps in representation? This might require advertising the position differently, reaching out to specific agencies in the community, adjusting hiring criteria, or writing a job ad that explicitly invites people with certain types of lived/work experience. Also think about volunteers, workshop leaders, mentors, guest speakers, and community artists that could be brought in.

Structure of the program

Brainstorm events, outings, workshop topics, food choices, and programming ideas that could help honour/reflect the anticipated profiles of the participants. Aim for multiple touchpoints for each profile, even if small. What are ways that you can explore, celebrate, and discuss the strength of your diverse backgrounds and experiences as a group? Who can you bring in to facilitate those discussions?

WORKSHEET 6

Planning for Roles, Infrastructure and Integration

The purpose of this worksheet is to provide an opportunity for the group to identify and describe the specific roles within the intervention. There will be opportunities within later modules in this guide to develop each role in more detail.

Role Name	Component	Home Agency	Role Description	Manager/ Person Supporting the Role	Infrastructure*	Hours per week	Funding Source	Hiring Required?
Peer specialist role	Peer component	LOFT Community Services	Peer contact, lead programs and socials	Julia	Cellphone with text and call plan, access to a printer	20	Grant LOFT	Yes

*Infrastructure refers to what that person will need to do their job. e.g., cellphone plan, transit pass, access to a vehicle, access to supplies, wellness/ self-care plan, office space, private meeting room, etc.

Component Integration

Beyond the meetings established in Worksheets 3 & 4, it is also important to think of the more routine ways in which the components of the intervention will work together and communicate with each other. This is an opportunity to identify potential silos and find ways to build better integration. Wherever possible, the various components of the integration should be working together to offer programming and services.

Under each heading list the people/role involved and answer the applicable questions.

Programming Integration

What opportunities are there to plan/deliver services together?

1. *Service/Activity 1:* Mental health group

What components will be involved? Peers; Psychologist

Notes for when, where, how? Weekly meetings –every Tuesday...

2. *Service/Activity 2:*

Case Conferencing

What opportunities are there to work together and coordinate on individual client plans and troubleshooting?

1. *Case conference 1:* Case management

What components will be involved? Case managers; psychologist

Notes for when, where, how? Monthly: 2nd Tuesday of every month; alternating locations

What is our process for getting client consent? Consent form at intake

2. *Case conference 2:*

Leadership and Planning

1. *What opportunities are there to work together on leadership and planning?*

What components will be involved? All components

Notes for when, where, how? Weekly meetings; Quarterly review meetings

WORKSHEET 7

Internal Communications Strategy

In our experience, a solid communication strategy is key to a complex intervention running smoothly because it keeps the components working together and helps identify and address potential issues as early as possible. The goal of this worksheet is to help the team develop such a strategy. Select the type of meetings you want to have and then fill out the corresponding details.

Regular Program Meetings

1. *Team Meetings*

How often? [we strongly recommend weekly]
Who is expected to attend?
Location?
Meeting lead?
Agenda?

2. *Component 1:* Mental Health

How often? [we recommend bi-weekly or monthly]
Who is expected to attend?
Location?
Meeting lead?
Agenda?

3. *Component 2:* Case Management

How often? [we recommend bi-weekly or monthly]
Who is expected to attend?
Location?
Meeting lead?
Agenda?

4. *Component 3:* Peer

How often? [we recommend bi-weekly or monthly]
Who is expected to attend?
Location?
Meeting lead?
Agenda?

Ad-hoc/Occasional Meetings

1. *Team building/socials*

How often? [we recommend bi-weekly or monthly]
Who is expected to attend?
Location?
Meeting lead?

2. *Review and planning*

How often? [we recommend quarterly]
Who is expected to attend?
Location?
Meeting lead?
Agenda?

3. *Stakeholder/Steering committee*

How often?
Who is expected to attend?
Location?
Meeting lead?
Agenda?

4. *Other:*

How often?
Who is expected to attend?
Location?
Meeting lead?
Agenda?

WORKSHEET 8

Timeline Planning

This is an opportunity as a group to map out the timelines for the planning stage. Within each category write into the box goals, milestones, events, and meetings.

Yearly timetable by month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Identifying the gaps												
Building partnerships												
Mapping the intervention												
Grant applications and funding												
Development and implementation												
Hiring												
Training												
Review/Check-in												

WORKSHEET 9

Agenda Planning for Team Meetings

Team meetings are an important part of any collaborative intervention, but it is also important that these meetings are focused and efficient. Here we provide a template for building your own team meeting agenda.

1. *Updates from component 1: Leadership*
   - Summary of recent activities
   - Upcoming plans
   - Feedback on impact/uptake/progress
2. *Updates from component 2: Case management*
   - Summary of recent activities
   - Upcoming plans
   - Feedback on impact/uptake/progress
3. *Updates from component 3:*
   - Summary of recent activities
   - Upcoming plans
   - Feedback on impact/uptake/progress
4. *Upcoming events/announcements*
5. *Any approaching deadlines?*
6. *Other business*
7. *Quick review (Stop/Start/Continue):*
   - Stop: Any activities we want to stop doing or do differently?
   - Start: Any activities we want to start doing?
   - Continue: Any activities we feel are working well and want to be sure to continue?
8. *Action items*
   - Action item 1:
     - Lead:
   - Action item 2:
     - Lead:
   - Action item 3:
     - Lead:
   - Action item 4:
     - Lead:

REFERENCES

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