Employing Staff with Lived Experience

A Toolkit for Shelter-Operating Organizations

October, 2022

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**TORONTO
SHELTER
NETWORK**

Acknowledgement

The development of this toolkit was only made possible through the contributions and collaboration of many individuals and organizations:

- Hundreds of people with lived experience who are interested in shelter work.

- Among these were dozens of peer workers and other staff with lived experience from the shelter sector and related sectors in Toronto.

- Hundreds of additional staff from Toronto's shelter and homelessness organizations, peer work organizations, training/education institutions, the City of Toronto government, and employment service providers, and other key partners.

Contributors participated in surveys, interviews, working groups, presentations, tool co-design, research, and more. We are deeply grateful for their contributions of time experience, expert knowledge; and for their passion for expanding equitable employment of people with lived experience in Toronto's shelter system.

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- Bridget Babirye (TSN Community Researcher)

- Elizabeth Tremblay (Founder, Mentor/Mentee Canada)

- Madelyn Gold (TSN Peer Champion)

- Mardi Daley (Founder, Lived Experience Lab; TSN Community Researcher)

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Advisory Bodies

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Shelter-Operating Organizations

- Covenant House Toronto

- Dixon Hall Neighbourhood Services

- Homes First Society

- Fred Victor Centre

- Toronto Housing and Homeless Supports - The Salvation Army

Other Partner Organizations

- Centennial College

- Lived Experience Lab

- Parkdale Activity-Recreation Centre

- Shelter Support and Housing Administration (SSHA) - City of Toronto

- The Neighbourhood Group

- Toronto Employment and Social Services (TESS) - City of Toronto

- Toronto Hostels Training Centre

- Working for Change

Individual Participants in Advisory Groups

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Toronto Shelter Network Staff Team

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The Employing Staff with Lived Experience: A Toolkit for Shelter Management and Human Resources Staff was created by:

Writing, tool co-design, and editing:

- Sonja Nerad (Executive Director, Toronto Shelter Network)
- Gabriela Russek (Pipeline Project Coordinator, Toronto Shelter Network)
- Bridget Babirye (Community Researcher, Toronto Shelter Network) -
- Elizabeth Tremblay (Founder, Mentor/Mentee Canada)
- Mardi Daley (Founder, Lived Experience Lab)
- Shoeb Ahmed (Community Researcher, Toronto Shelter Network)

Report Design by Green Living Enterprises

Copies of additional tools and best practices guidance created by other organizations and authors are included in Appendix B, and the source is credited where they appear, and in the Annotated Bibliography. We are grateful for the wisdom of these researchers, writers, and practitioners, whose work deeply informed this toolkit.

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1 Introduction

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1.1 About the Pipeline Project

In July 2020, with funding from the Metcalf Foundation, the Toronto Shelter Network (TSN) launched The Shelter Sector Pipeline Project: from Homelessness to Equitable Work, a 2-year research and action project. TSN is an umbrella organization comprised of 35 member organizations that together operate Toronto's 24-hour emergency homelessness system, including emergency shelter, respite, 24-hour drop-in and COVID hotel programs (collectively referred to as "shelters" or "the sector"). We champion the best housing outcomes for people experiencing homelessness and we enhance the collective capacity of diverse homelessness service providers in Toronto through knowledge sharing and learning, collaborative planning, research and advocacy. More information about the TSN can be found **on our website**.

Project Purpose and Objectives

The purpose of the Pipeline Project is to support Toronto's 24-hour emergency homelessness sector in a collective effort to hire, retain, and promote people with lived experience of homelessness or related lived experiences (PWLE); and to help organizations across the sector to be exemplary employers for these staff.

Objectives

- To develop evidence-based tools, resources, and strategies that can help the sector to provide good quality employment opportunities and experiences to PWLE;

- To develop and advance policy and practice recommendations so that they are collectively adopted by the sector and supported by policy makers/funders.

Planned Project Results

- Toronto's shelters have resources on best practices for an equitable approach to employment of people who have lived experience in the homelessness sector.

- Toronto's shelters are using policies and practices (including principles, objectives, practice elements/ standards and performance measures) that foster a consistent approach to equitable employment for PWLE in the shelter sector.

- PWLE who are engaged in the Pipeline Project have increased knowledge and skills and enhanced prospects for employment in the shelter sector.

Planned Longer Term Outcomes

- More PWLE are employed in the sector and/or experience upward mobility at work and/or attain employment that matches their employment goals.

- PWLE feel supported by their employers in the workplace.

- More PWLE have improved access to sustainable incomes and to the broader determinants of health and well-being (i.e., housing, food security, social connectedness, etc.).

Project Activities

Year One

During year one we established a foundation of knowledge about the current state of employment for PWLE in the sector.

- Convened an Advisory Committee made up of 24-hour homelessness service providers, employment agencies, training and education providers, as well as organizations with expertise in peer programing; and an Advisory Committee composed of PWLE with an interest in shelter work.

- Conducted an environmental scan to document best practices regarding policies and practices that are effective at equitably employing PWLE.

- Conducted two surveys to identify barriers, facilitators, current practices,

and recommendations around employing, retaining and promoting PWLE in Toronto's shelter system. The first survey was administered with 278 sector staff, both front line and management, and the second survey was administered with 150 PWLE with an interest in shelter work. View the **Summary Survey Report**.

- Collected tools, resources and best practices.
- Engaged with the sector to share research findings and identify immediate priorities for year two of the Pipeline Project.

Year Two

During year two we designed, reviewed, adapted and tested tools, resources and best practices with the sector.

- Based on priorities identified through the surveys and engagement with the sector, we established two Working Groups, the Recruitment and Hiring Working Group and the Peer Workers in Shelters Working Group.
- Provided guidance and advice regarding best practices to diverse shelter staff (frontline, case managers, housing workers, HR, managers) to help build their capacity to enhance the pathway to employment for current and recently-housed clients and to expand peer work in their organizations and/or implement best practices.
- Researched the state of peer work in

Toronto shelters – challenges, benefits, and best practices – through secondary research and interviews of peers, supervisors, and clients. Through the Working Groups, and consultation sessions with shelter sector peer workers, we collaboratively established priority best practices recommendations, and developed shared definitions of key concepts around peer work and employment of PWLE, by integrating diverse stakeholder perspectives.

- Developed tools, resources and strategies to better enable organizations in the sector to hire, retain, and promote people with lived experience of homelessness.
- Held information sessions and workshops to disseminate best practices and to engage the sector in dialogue promoting the employment of PWLE.

The Need for the Project

The Pipeline Project was initially conceptualized in 2019 – well before the pandemic and the opioid crisis. At that time the sector was already struggling to recruit and retain staff with the skills and qualities required to effectively and safely support complex and vulnerable populations. While the sector as a whole did not yet have a practice of employing PWLE, we knew that PWLE were an important part of the solution to this challenge. We envisioned an employment pipeline to support PWLE to a) access jobs in the shelter sector; b) move

beyond the role of "peer worker"(to which they are often assigned), and c) promote their upward mobility in the shelter sector.

To develop a baseline understanding heading into the Pipeline Project we drew upon research describing the barriers to accessing and maintaining employment facing PWLE, and looked to other sectors, especially the mental health sector, for best practices in creating "supportive employment" (SE) models. We found a dearth of information about the employment of PWLE within the shelter sector, but learned that guiding policy and service models would be critical success factors. Without these we would risk creating a fragmented and inequitable employment environment for a marginalized population.

For the past two years the Pipeline Project has sought to galvanize the collective capacity of the sector towards developing equitable employment opportunities and conditions for PWLE. This toolkit is a repository of some of the tools and resources that have been un-earthed and developed through the project activities. To help prioritize and ensure the inclusion of relevant content we referred consistently back to the findings of Year One research undertaken with the sector and PWLE. The toolkit will evolve and be adapted over time as we continue to build our knowledge base through applied practice and more research.

Additional tools and future revised versions of the complete Toolkit will be posted on our website as they are created in the coming years. Visit the Shelter Sector Pipeline Project webpage to access this new content: www.torontoshelternetwork.com/shelter-sector-pipeline.

Defining Key Terms

Background: How the Definitions Were Created

Through ongoing consultations with PWLE, shelter staff, and peer work experts, and review of secondary sources, we developed the following definitions of terms to use in the context of this Toolkit and the Pipeline Project, for essential concepts and categories around employment of PWLE in shelters. We co-designed the definitions with stakeholders, but at this time there are not yet universally agreed-upon definitions for all of these terms within the group we consulted, much less in the Toronto shelter system at large or in the broader social services sector in Toronto and beyond.

We want to acknowledge that:

1. Some use these terms to mean something entirely or partially different

2. Some use a different term for the same concept

3. Some people that we consulted have concerns about certain terms or the definitions we are using. See A Diversity of Definitions, p. 91 of section 7.1 for more details about the current debates around language to use around shelter roles/positions for PWLE.

Key Terms

Shelter means any of the following: 24-hour emergency homeless shelters, respite centres, 24-hour drop-ins, transitional shelters, and COVID response hotels/programs

In the context of the shelter system:

People with lived experience (PWLE) means people who:

1. **Have stayed in a shelter or experienced homelessness** of any kind, including people who have:
   » used other homelessness services, such as drop-ins;
   » Stayed in encampments;
   » Lived outside without being in an encampment;
   » Had to stay with other people in a temporary or precarious situation due to not having anywhere else to live (e.g., couch surfing)

AND/OR

2. **Had other types of life experience that are common among people experiencing homelessness**, such as:
   » Refugee experiences
   » Mental health challenges
   » Substance use challenges

or addiction
   » Youth homelessness
   » Street sex work or trafficking experience
   » History of trauma or abuse
   » Discrimination or marginalization on the basis of identities that are overrepresented in the shelter resident population (LGBTQ+, Indigenous, Black, having disabilities.)

Staff with lived experience (staff WLE) are PWLE who do any type of paid work at a shelter or for a shelter.

- In terms of work location, this includes:
   » People working at a shelter site
   » People working for a shelter-operating organization in a role that impacts the shelter(s), but who work remotely or in a separate building of the organization, such as human resources, administrative work, senior management, researchers, etc

- Regarding the staff's legal/financial relationship to the shelter, we include a wide variety of arrangements, including:
   » Employed by the shelter organization full-time, part-time, or casually
   » Paid directly by the shelter organization but not an employee (eg - independent contractor, trainee receiving a stipend)
   » Employed and/or paid by another organization, but doing work at a shelter site or for a shelter-operating organization

Roles designated for PWLE, also known as LE-designated roles or positions, are paid or unpaid roles that:

- **Are exclusively for PWLE; and**
- **Have been designed to have different responsibilities and required qualifications** from the organization's "general shelter work" positions which are open to people with or without LE.
- May or may not require drawing on their LE

These roles can involve doing work for or at a shelter in any capacity, including:

- Occasional paid work or volunteer work
- Formal volunteer positions
- Peer programs
- Traineeships
- Jobs

See infographics **Tool 7C Peer Program/ Position Profiles**, p. 103 for more information.

Peer workers are paid staff in jobs designated for PWLE in which they are expected to draw on their lived experience to inform their work. In most cases, they are expected to identify themselves as PWLE to clients, colleagues, and/ or community members, depending on the nature of the position.

Peer volunteers are people in unpaid roles that involve:

- Similar types of responsibilities to peer work; and/or
- Providing informal peer support (see definition below)

Peer work refers to the work done by a peer worker, or a peer volunteer in a structured position. (We believe that shelters should always pay people who are doing peer work, but we recognize that this is not always the current reality.)

Peer support: providing emotional, social, or practical support to people with lived experience similar to one's own.

Peer support is commonly broken into two categories:

1. **Formal peer support:** "Peer support that is offered by trained and/or experienced peer support workers within a structured setting".[1]

2. **Informal peer support:** "Less structured support provided by [people] who are drawn together by what they have in common, with none more experienced or better prepared to offer support than the other". Usually unpaid and commonly involves clients/residents/participants of the same site or program.[2]

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1   Sunderland, Kim and Mishkin, Wendy, Peer Leadership Group, Mental Health Commission of Canada. (2013). *Guidelines for the Practice and Training of Peer Support.* Calgary, AB: Mental Health Commission of Canada. Retrieved from: www.mentalhealthcommission.ca

2   Sunderland, Kim and Mishkin, Wendy, Peer Leadership Group, Mental Health Commission of Canada. (2013). *Guidelines for the Practice and Training of Peer Support.* Calgary, AB: Mental Health Commission of Canada. Retrieved from: www.mentalhealthcommission.ca

Tool 1A Framework: The Employment Pathway

The Pipeline Project uses the following Employment Pathway as the guiding framework for our research, and as the structure for our best practices toolkits.

The Path of Employees   ## The Path of Employers

Preparing the applicant

- Identifying and developing interest in shelter work among PWLE
- Pre-employment services
- Training and education

Preparing the organization

- Identifying and developing shelters' interest in employing PWLE
- Organization change: transforming culture, knowledge, and structures
- Job design

Hiring Process

- Recruitment and hiring
- Onboarding

During employment

- During employment – supervision, supports, accommodations, equity, equality
- Ongoing training for staff WLE and for the organization
- Career development and promotion

Ongoing organization change work

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Framework: The Employment Pathway

The Path of the Employer

This document, *Employing People with Lived Experience: A Toolkit for Shelter-Operating Organizations*, is focused on "The Path of the Employer" on the Employment Pathway infographic (see previous page). This is the path traveled primarily by human resources and management staff at shelter-operating organizations. They:

- **Have primary responsibility for – and control over – the first 3 stages of the "path of the employer":**
  a. Identifying and developing shelters' interest in employing PWLE
  b. Organization change: transforming culture, knowledge, power, and structures
  c. Job design

- **Engage with applicants/staff WLE in the role of an employer during remaining stages of the "Employment Pathway":** evaluating applications, hiring/firing, supervising, and carrying out the responsibilities that a human resources department has toward employees.

Shelter management and human resources staff may be assisted on this path by advisors with lived experience, external partner organizations like Toronto Shelter Network or funders/regulators like the Shelter, Support, and Housing Administration (SSHA). All of these types of partners may provide support or direction around organization change efforts, strategic planning, and development and implementation of initiatives around employment of PWLE.

The Path of the Employee

In Phase 2 of the Pipeline Project, we are planning to develop another guide: Shelter Employment for PWLE: a Toolkit for PWLE and the Staff Who Support Them, which will be posted on the **Pipeline Project website**. This will focus on the "Path of Employee", traveled by people with lived experience who seek - and ultimately attain - employment in the shelter sector, with assistance from the staff at shelters and other organizations who support them on their journey.

These staff:

- **Assist PWLE with the first 3 stages of the "Path of the Employee":**
  » Identifying and developing interest in shelter work among PWLE
  » Pre-employment services
  » Training and education

- **Participate in the remaining stages of the "Employment Pathway" in the capacity of a supporter, service provider, educator or ally by**
  » Helping the PWLE to navigate the recruitment and hiring process successfully whenever they are seeking a new job or promotion
  » Supporting PWLE during employment to help them succeed at, enjoy, and retain their jobs
  » Providing education and training, or helping PWLE to access them

Building the Pipeline

A central long-term goal of the Pipeline Project is to to bring together the stakeholders on both sides of the Employment Pathway to "build the pipeline", **establishing a strong and sustained network of collaboration to actively support current or former shelter residents throughout their journey from homelessness, to employment in the shelter sector** that matches their interests, abilities, and long-term goals. Partners in the pipeline would ideally include, at minimum:

- Management at shelter-operating organizations

- Frontline staff at shelters

- Employment services providers

- Training/education institutions that provide training relevant for shelter work or peer work

- Shelter human resource departments

This pipeline could be expanded to support people with other types of lived experience that is relevant to shelter work, by bringing in a broader range of partner organizations, such as immigrant/refugee organizations, drop-in centres, and community health centres.

1.2 About this Toolkit

Who is the Audience for This Toolkit, and for What Initiatives is It Relevant?

The primary target audience is human resources (HR) departments and management staff at shelter-operating organizations who are leading or implementing initiatives around employment of PWLE.

The toolkit is intended to support shelters in designing and implementing policies, practices, programs, new types of jobs, and other initiatives around employment of PWLE that would most commonly be led by human resources departments, senior management, shelter site managers, and/or direct supervisors of frontline staff. These initiatives may be of any scale or type, including but not limited to:

- **Targeted changes to a specific policy or practice** around recruitment and hiring, supervision, or during-employment supports.

- **Organization-wide shifts in culture, values, and awareness** across the entire staff team, to create a welcoming workplace for staff WLE

However, for these initiatives to succeed, these management staff would need to engage other stakeholders, and parts of the toolkit will be relevant for them as well. Depending on the nature of the initiatives, relevant stakeholders may include

- the board of directors
- lived experience advisory committees
- unions
- frontline shelter staff
- employment services departments
- current clients/residents
- funders
- government staff
- other PWLE interested in shelter work
- representatives of external partner organizations.

Some types of engagement that are likely to be valuable or required include:

- **Consulting** for insights and information when planning new policies, practices, or initiatives

- **Getting approval** of new policies and practices where required (Eg from unions, senior management, site managers, etc)

- **Ensuring buy-in** around best practices and use of tools, by the people who will be responsible for promoting and implementing them.

- **Partnering in co-design** and/or collaborative decision-making processes

The toolkit will be particularly valuable for these additional stakeholders when they are participating in working groups that are collaboratively planning initiatives within a specific shelter organization or across the Toronto shelter system. Such initiatives may include, but are not limited to:

- **Peer work programs** that train peers, connect them to placements in shelters, and provide supportive supervision during the placement.

- **"Building the Pipeline" initiatives** to establish partnerships of shelter frontline staff; employment services providers; training institutions; and shelter human resource departments, and other partners, to actively support cohorts of current or former shelter residents throughout their journey from shelter stays toward employment in the shelter sector that matches their interests, abilities, and long-term goals.

Types of Tools

There are four basic types of tools in this guide:

1. **Best practices tipsheets:** lists of best practices around a particular topic or stage of the employment pathway, with color-coding (see **Tool 1B Color-Coding Key – For Best Practices Tipsheets**, p. 15) to help shelters to identify practices that are likely to be feasible for their organization given where they are in their journey toward becoming a champion exemplary employer for PWLE.

2. **Infographics:** more complex images that use spatial arrangement of information on the page to communicate key concepts, for example:
   - » **Diagrams of categorization schemes** (eg, types of organization change work; types of shelter work positions)
   - » **Visualizations of pathways** traveled by PWLE and/or shelter organizations, on the way to achieving successful employment of PWLE in Toronto's shelter system
   - » **Decision trees** to help shelters to systematically think through their goals and priorities around employment of PWLE, to determine the types of programs/positions/initiative to focus on

3. **Practical tools:** tools for shelters to use to implement best practices, such as lists of sample questions (eg for job interviews or accommodations discussions), fillable forms, and checklists. These tools were created specifically for shelters as part of the Pipeline Project, to meet needs identified by Toronto shelters

4. **Tools from Other Sources:** lists of excellent existing tools for slightly different sectors or target groups of PWLE, that can easily be adapted for use by Toronto shelters. These include tools of all three types: best practices guidance, infographics, and practical tools. We provide citations and brief descriptions of each tool, along with links to copies available within the toolkit, **Appendix B: Tools from Other Sources**, p. 141 or an external website.

The tools are accompanied by background information about:

- The benefits of employing PWLE in shelters

- The benefits of implementing the recommended best practices

- Special shelter-sector-specific challenges around employment of PWLE

Color-Coding Key – For Best Practices Tipsheets

On the tipsheets, the color of each best practice indicates how complicated and time-consuming that practice is likely to be for a shelter to plan and carry out. The colors assigned are approximations based on our consultations with diverse shelter organizations; of course in practice the difficulty of each of the practices varies among different organizations. This key provides details about what we mean by "small-scale / minor" ,"mid-sized / moderate", or "large-scale / major" projects or changes to policies, practices, and organization structure.

Minor Project - Yellow

Small-scale projects, or minor changes to policies or practices

- **Permitted and feasible for human resources staff or individual shelter managers to plan and carry out on their own, with input from relevant stakeholders such as:**
  - » People with lived experience (current staff, clients, and/or applicants)
  - » Human resources staff
  - » Shelter managers and other senior management
  - » Shelter frontline staff
  - » Outside partner organizations

Mid-Sized Project - Blue

Mid-sized program or special project; or moderate changes to policies, practices, or culture

- **Planning and implementation require coordination among human resources and shelter management and/or frontline staff; plus possibly other departments and external stakeholders**
- Staff outside of human resources will need to:
  - » Contribute to the work and/or
  - » Be trained – and persuaded – to make changes to their practices, build their skills and knowledge, or shift their attitudes
- Approval is needed from specific senior managers (in most cases)
- External organizations may be engaged or provide advice

Large Project - Red

Large-scale initiatives; major changes to policies, practices, culture or organization structure

- **Require high-level buy-in, approval, and involvement** – eg, of senior management team, union, or board of directors
- Usually involve **collaboration with multiple departments or external partners**

Types of initiatives in this category include:

- **Organization-wide initiatives** involving things like:
  - » Changing policies and practices
  - » Culture-change or staff learning/training
  - » Re-designing power structures and decision-making practices
- **Projects requiring a large team to implement**

1.3 Glossary

Formal Peer Support
Peer support that is offered by trained and/or experienced peer support workers within a structured setting.

General shelter jobs
Jobs at shelters that may be held by people with or without lived experience.

Honorarium
Small thank you payment to a volunteer.

Informal Peer Support
Less structured support provided by people with similar lived experience who are drawn together by what they have in common, with none more experienced or better prepared to offer support than the other.

Lived Experience (LE)
In the shelter sector, this means having experienced homelessness or other experiences common among shelter residents/clients.

People with Lived Experience (PWLE)
People who have stayed in a shelter or experienced homelessness of any kind and/or had other types of life experience that are common among people experiencing homelessness.

Peer Program
Programs that combine peer work opportunities, work-related training, support services, recovery support groups with other peers, etc. In the shelter sector, the work-related training would ideally include, at minimum, training in general employment skills, peer support, and specialized shelter work skills.

Peer Support
Providing emotional, social, or practical support to people with lived experience similar to one's own.

Peer Volunteers
People in unpaid roles that involve similar types of responsibilities to peer work; and/or providing informal peer support.

Peer Work
Paid roles for PWLE that require drawing on lived experience.

Roles Designated for PWLE or **LE-designated roles or positions**
Paid or unpaid roles that are exclusively for PWLE. These roles may or may not require drawing on their lived experience, but the positions have been designed to have different responsibilities and required qualifications from the organization's "general shelter jobs" which are open to people with or without LE.*

Shelter
Any of the following: 24-hour emergency homeless shelters, respite centres, 24-hour drop-ins, transitional shelters, and COVID response hotels/programs.

Staff with Lived Experience (Staff WLE)
PWLE who do any type of paid work at a shelter or for a shelter.

Stipend
Payment to help cover living expenses while you complete a traineeship or placement.

*Note: certain authors and organizations use very similar terms but give them a somewhat different meaning. For example, in QMHC *Full Report* (2019), the authors use the terms "lived experience roles", "lived experience workforce" and "lived experience designated" jobs to refer exclusively to formal positions that fall within this Toolkit's definition of "peer support".

1.4 Benefits of Expanding Employment of PWLE in Shelters

Note: for a brief summary of the benefits detailed in this section, see the infographic, **Tool 1C** *Benefits of Employing Staff WLE in Shelters, p. 19.*

Benefits for Shelter Organizations

Strengthens Workforce

- Helps build a stronger, skilled shelter workforce

- Helps address chronic staff shortages

- Brings in staff with unique abilities to address specific challenges shelters are facing, such as overdose crises or challenging relationships with the local community

Improves Overall Shelter Operations

Beyond the direct benefits that peer workers and other staff WLE provide to clients, building a staff team that reflects the diversity of lived experiences and identities of your client/resident can have broad positive impacts on the shelter-operating organization:

- **Staff WLE can be a learning resource for other staff**, enabling them to better understand and connect with clients

- **Improved workplace experience for all staff, which in turn leads to improved retention across the entire staff team.** For example, creating a workplace that better supports mental health and reduces burnout benefits all staff. This might include practice like creating a culture where it is more widely accepted to take time off or take breaks during the workday.

- **Opportunity to gain alternative insights about shelter operations**. Past/current shelter residents have unique insights about needed improvements, and can help to generate creative strategies to address them that are rooted in a deep personal understanding of client/resident needs and preferences

Benefits for PWLE Who Become Employed

Employment opportunity and abilities

- Gain employment in a type of work that interests them

- Increased employability, due to building
  - » general workplace skills
  - » sector-specific expertise

- Increased income

Personal growth and sense of purpose:

- Increased self-confidence

- Fulfills their desire to give back to others going through what they have been through

Increased Well-Being

- **Better access to social determinants of health**
  - » Housing stability
  - » Food security
  - » Supportive relationships
  - » Connection to community

- **Increased trust and engagement with service organizations**, which enables them to have a better experience and more positive outcomes when accessing services themselves as a client/resident

Benefits for Shelter Clients/Residents of Having Staff WLE

Improved experiences during shelter stay:

In studies of the impacts of peer workers and staff WLE, clients/residents in diverse relevant sectors report that these staff greatly improve their experiences of receiving services

- **Clients/residents benefit from trusting and supportive relationships with staff WLE** – clients report that it's often easier to trust and connect

with staff WLE, who have had similar experience and understand firsthand

- **Clients/residents feel seen and respected**
- **Clients/residents receive enhanced support with navigating service systems** that the staff WLE have used for themselves

Improved qualitative outcomes reported by clients:

- **Providing hope** – people see someone else with similar challenges who has succeeded at achieving their goals, and are inspired to believe it is possible for themselves
- **Role modeling life skills** – peer workers and other staff WLE can demonstrate how to carry out essential life tasks, navigate complex services systems, and work through trauma, because they've done it themselves

Improvements in quantitatively measurable outcomes:

Research on impacts of staff WLE on outcomes specifically for shelter residents is limited, but significant impacts have been found in the mental health and addictions sectors, which would be relevant for many shelter residents. A literature review by Davidson et al. (2012) of research on peer support in mental health services found

that peer-delivered services generated superior outcomes for people with mental health challenges in terms of

- **reduced rates of hospitalization** and days spent as inpatient
- **decreased substance use** for those with substance use challenges
- **reduced levels of depression and psychosis**

We are optimistic that future research will find similarly positive impacts for shelter residents around accessing and maintaining stable housing and achieving other life goals.

Benefits to Clients/Residents of Having a Larger and More Stable Staff Team

In addition to the distinctive benefits of increasing the percentage of the staff team that has relevant LE, large-scale initiatives to recruit, hire, and retain staff WLE can lead to a larger and more stable staff teams overall, which further improves client experiences and outcomes:

- More staff engagement and support for each client
- Reduced turnover enables more staff members to build stable and long-term supportive relationships with clients/residents
- More staff are available to provide additional services that are difficult for a stretched-thin frontline staff team to meet, such as harm reduction, counselling and mentoring, housing placement support, and pre-employment services.

Benefits of Employing Staff WLE in Shelters

For PWLE Interested in Shelter Work

- Help provide employment opportunities and income for shelter clients/residents and other PWLE
- Personal growth and sense of purpose
- Improved access to social determinants of health (housing stability, food secutiry, etc)

For Shelter Organizations

- Address staffing shortages and recruitment challenges in the shelter sector
- Improve overall shelter operations
- Improve working conditions and skills for all staff

For Shelter Clients/ Residents

Improve their experiences during shelter stay, due to:

- Larger and more consistent staff team
- Expanded types of services provided
- Supportive and trusting relationships with staff WLE who understand their experiences

Improve client/resident outcomes

- Increased sense of hope and empowerment
- measurable outcomes (eg around mental health, substance use, housing stability)

1.5 The Diversity of People with Lived Experience Relevant for Shelter Work

Introduction

In the Pipeline Project, we have defined lived experience broadly. We believe that it is valuable for shelters to design initiatives to employ PWLE that intentionally target people with a wide variety of types of LE that are experienced by many clients/residents of Toronto's shelter system. There are two key reasons:

1. **The Pipeline Project surveys and consultations have revealed a very diverse range of PWLE in Toronto who have an interest in shelter work.** The employment barriers, goals, skills, and needs of people who have used Toronto shelter services vary dramatically - from people experiencing chronic homelessness who have little employment experience and are in recovery from a substance use challenge, to social workers who have recently moved to Canada from another country as refugees. The barriers, needs, skills,

and goals are even more diverse when you include PWLE who have never stayed in a shelter but have some type of lived experience relevant to shelter work.

Targeted approaches will be necessary, both during recruitment and during employment, to attract and support these distinct populations.

2. **For clients who will be supported by staff WLE, it can make a big difference to have staff who share specific aspects of your lived experience or identity**, so it is valuable for shelters to intentionally recruit a staff team that reflects the full diversity of your clientele/residents. An initiative focused in a non-specific way on recruiting staff with lived experience of homelessness may not achieve this outcome.

For each stage of the employment pathway, the best practices that are most likely to be valuable for current and future staff WLE may be different depending on:

- the types of lived experiences they have had
- their identities and demographics
- their qualifications and interests.

It is important for shelters to take this into account when developing general policies and practices around employment of PWLE throughout an organization;

and when designing peer programs and other specialized positions for PWLE.

Identities and Demographics:

We have learned from our research and advisory groups that it is important for shelters to develop and implement specialized strategies focused on specific identity groups and demographics, to increase the presence of each of these groups on your team, create a more positive work environment for them, and facilitate their success on the job.

The priority groups to focus on will differ depending on the current make-up of your clientele/residents and staff team; but the existing research and the people we surveyed/consulted have highlighted the following priority identity groups as likely to be important for many shelters - and Toronto's shelter system collectively - to focus on, for two reasons. They reached these conclusions based on the challenging experiences that members of these groups have had when applying for or working in shelter jobs; and on the fact that the current make-up of the clientele and staff teams in Toronto's shelter system indicates that more staff from these identities will need to be recruited to help the staff team to better mirror the demographics of the communities served:

- Black
- Indigenous

- Asian
- 2SLGBTQ+
- Refugees and newcomers
- Youth experiencing homelessness
- People with disabilities (visible and invisible), including
  - » People with experience of mental health challenges, and/or lived experience of the mental health system
  - » People with experience of substance use challenges

As we expand this toolkit during Phase 2 of the Pipeline Project, we will develop a set of specialized research-based tools and resource lists focusing on key best practices to facilitate increased hiring of staff from each of these groups (and others, as recommended by PWLE and shelter staff that we consult) and to create a positive work environment and successful employment experience for them.

Education, Work Experience, and Lived Experience

When developing general policies and practices around employment of PWLE throughout an organization, the individual's lived experience, work experience, and education background all impact the types of supports, accommodations, and training that PWLE will need at each stage

of the employment pathway. It is important to build in flexible approaches that offer options to meet a diversity of needs among prospective and current staff.

It is also important for the shelter system to have a wide variety of specialized positions or employment programs for PWLE, so that there will be options that will be a good fit for people with a variety of skills, interests, and current life situations. This creates opportunities for PWLE who are starting from different places, and ensures a continuum of opportunities for people to move into throughout their career. Since no one shelter can be expected to offer positions to meet the needs and goals of all PWLE interested in shelter employment, coordination with partners across the sector is important.

Key aspects of PWLE's experience that can be relevant include:

- Type of lived experience
- Recency of lived experience
- Experience as a client/resident of shelter-operating organizations
- Overall life stability
- General employment readiness
- Work experience (level, relevance, how recent)
- Education background (level, relevance, how recent)
- Relevant skills/knowledge

- Career goals and interests
- Other employment barriers (that do not fit within the other topics)

When planning initiatives geared towards a group of people with a particular type of lived experience, it is important not to make assumptions about the qualifications, employment-readiness, and employment goals among people who are experiencing, or have experienced, homelessness, mental health challenges, substance use challenges, or other frequently-stigmatized lived experiences. For example, some participants in a peer program for people who have experienced mental health and addictions challenges may have professional experience working in social services, while others may have little employment history of any kind. The program design must take that diversity into account.

Visioning: Which PWLE Does Your Employment Initiative Aim to Engage?

We recognize that for most shelters, it will not be feasible to launch initiatives that involve targeted engagement and supports for the full range of PWLE along all of these factors, especially in the early stages of your organization's process of transforming your approach to employing PWLE, or developing peer programs and traineeships.

Nevertheless, if you think systematically to identify which priority groups you are aiming to focus on both in your first initiative(s), and in the long-run, it can help your shelter decide:

1. Which stage(s) of the employment pathway are most important to focus on, and which one(s) to address first

2. Which best practices to start with, within each stage of the pathway

3. Details of the design and implementation of specific practices, policies, and projects

4. Whether to modify existing job descriptions for "general" shelter jobs to make them more appealing and accessible for the groups you are aiming to attract and employ; create special new positions, traineeships, or peer programs specifically for PWLE; or both. (See **Tool 2B** Types of Shelter Roles/Jobs: Deciding What You Want, p. 34, to explore different types of positions you may want to modify or create.)

To think about these questions more concretely, it may be helpful to consider specific potential individuals who represent distinct types of life stories that are common among PWLE of homelessness, and envision what an initiative that is inclusive and valuable for them would look like. Here are some examples:

Fictional Case Study #1:

A man in his 50s who has experienced long-term chronic homelessness and unemployment (10 years), moving between shelters, precarious housing, and staying on the street. He moved into supportive housing six months ago, and is interested in work opportunities at the shelter where he was staying immediately prior to becoming housed, to give back to an organization that made a difference for him. He has a history of substance use challenges, but has achieved some stability with support from harm reduction services. Ready to try a small number of occasional work hours, but needs a lot of support throughout all stages of the employment pathway. Has previous employment experience in customer service, but not in a social services setting. He has an interest in eventually becoming a part-time peer support worker / peer supporter.

Fictional Case Study #2

A refugee from Somalia who arrived in Canada eight months ago and has been staying at a refugee family shelter. She has no relevant Canadian education or work history, but was a social worker with a relevant B.A. in Somalia who worked in a mental health clinic. She worked with people with complex mental health and substance use challenges, as well as refugees experiencing post-traumatic stress disorder, and is skilled at trauma-informed care. Fluent in Somali, Arabic, and French; speaks English, but not fully fluent. Her asylum application is in progress, and she is working to arrange for her husband and children to join her in Canada. For now, she is seeking general frontline worker roles in shelters, drop-ins, or supportive housing; but her long-term goal is to be a therapist or counsellor, working with clients with complex mental health challenges in an institutional setting (shelter or other).

Fictional Case Study #3:

25-year old who experienced youth homelessness as a teenager (from age 16-19), after coming out as non-binary and being forced to leave their parents' home. They spent some time couch surfing, in shelters, and in an encampment. They have been stably housed in a private market apartment shared with roommates for the past five years, and have been employed in customer service at Target. Now that their life feels more stable, they want to pursue a career they are more passionate about, helping young people who are going through what they went through, but they have no post-secondary education and aren't sure how to begin. They would prefer work or traineeship opportunities that are not defined as "peer" roles and that don't require disclosing their lived experience. They are interested in a long-term career in the sector, eventually in a supervisor/manager role.

Once you have a rough sense of which groups of PWLE you are targeting, we recommend surveying a sample of members of the group(s) that your initiative aims to recruit and/or support, to inform your design of the program by better understanding the full diversity of their experiences, needs, qualifications, and interests. Depending on the program, policy, or project that you have in mind, this could mean doing a survey of your own clients (see the **Tool 1D** Multi-Purpose Tool: for Defining, Describing, and/or Surveying the PWLE You Aim to Engage, p. 24 and **Tool 7E** Peer Work: Client Survey, p. 112 for an example); your current staff team (see **Tool B2.3** Fred Victor Staff Survey (to learn about the lived experiences of your staff team) on page 136 for an example); participants in a peer program at your organization; or a broader population in Toronto, such as people using harm reduction services, or recent refugees.

Tools from Other Sources on Employment of People of Particular Demographic Groups, Communities, or Identities

This is a very preliminary list, to be expanded during Phase 2 of the Pipeline Project. See Annotated Bibliography for more information on the sources.

This list provides the name of the organization, project or author that produced the tool, the year of publication, the pages where they appear in their original document, and (if available) links to the tool inside this PDF and/or URLs for the full original source document. Page numbers given are the pages where this content appeared in the original document. I used the page numbering appearing on the pages of the document, where it existed; otherwise I used the PDF page numbers.

Youth:

Creating, Managing, and Supporting Spaces for Young Adult Peers
Guide from LOFT Community Services
(Authors: Daley, M., Egag, E.)

Report on benefits, barriers, and best practices around employing young adult experts and peers in the mental health, housing, and homelessness sectors. Practices focus on organizational readiness, ethical inclusion, and designing the peer role. Focused on youth who have lived experience related to these sectors.

Racialized Groups:

Appendix – Workplace policies, practices and decision-making processes and systemic discrimination
Source: Ontario Human Rights Commission (2005, minor revisions 2009), pp. 54-57.

A best practices tipsheet found in the online document *Policy and guidelines on racism and racial discrimination*. Also relevant for others protected on Ontario Human Rights Code grounds, such as gender or age.

People with Disabilities:

Hire for Talent
Online toolkit for employment of people with disabilities, from Restigouche Community Business Development Corporation

Tool 1D Multi-Purpose Tool: for Defining, Describing, and/or Surveying the PWLE You Aim to Engage (p. 1/2)

This table is a template that you can use to aid in visioning to determine which populations(s) you are trying to support and engage with your employment initiatives. See bottom of next pages for suggestions of ways to use this form.

Title:	
Brief Description: *(of the individual's story, or of the groups of PWLE that you would like your initiative to focus on)*	
Recency of lived experience	
Type(s) of lived experience	
Experience as a client/resident	
Self-identified key aspects of identity/demographics:	
Overall life stability	
Employment readiness	

METCALF FOUNDATION

Work experience	
Education background	
Skills/knowledge	
Career goals and interests	

Suggestions for How to Use This Form

This template can be used as:

- a tool to outline your concept of which group(s) of PWLE your initiative is intended to recruit and hire, and/or support in the workplace
- a tool to put together your own (real or fictional) case studies that reflect various populations who stay at your shelter and/or other groups of PWLE
- a questionnaire or interview form for surveying shelter residents interested in shelter work, to learn about their experiences and employment goals.

You can fill in your own title for the tool, based on how you will be using it. Some options to consider:

- Fictional Case Study of Person WLE Interested in Shelter Work
- Case Study of Person WLE Interested in Shelter Work
- Defining the Target Groups of PWLE for Our Employment Initiative
- Survey of PWLE Interested in Shelter

Title: Fictional Case Study of Person WLE Interested in Shelter Work	
Brief Description: *(of the individual's story, or of the groups of PWLE that you would like your initiative to focus on)* *Case #1* A man in his 50s who has experienced long-term chronic homelessness and unemployment (10 years), moving between shelters, precarious housing, and staying on the street. He moved into supportive housing six months ago, and is interested in work opportunities at the shelter where he was staying immediately prior to becoming housed, to give back to an organization that made a difference for him. He has a history of substance use challenges, but has achieved some stability with support from harm reduction services. Ready to try a small number of occasional work hours, but needs a lot of support throughout all stages of the employment pathway. Has previous employment experience in customer service, but not in a social services setting. He has an interest in eventually becoming a part-time peer support worker / peer supporter.	
Recency of lived experience	■ Current: lives in supportive housing ■ Stayed in shelter until 6 months ago
Type(s) of lived experience	■ Long-term chronic homelessness (5+ years), moving between shelters and street homelessness ■ Substance use challenges
Experience as a client/resident	■ Former client/resident of the shelter where they are seeking employment
Self-identified key aspects of identity/demographics:	■ male ■ white ■ middle-aged (50s)
Overall life stability	■ **Housing:** has been successfully housed for 6 months, experiencing some challenges with meeting obligations of a tenant, but not at risk of eviction ■ **Health/disability:** ongoing opioid use managed through harm reduction supports

Employment readiness	■ Feels prepared to try a small amount of work ■ Looking for a lot of supports around general work-readiness skills, such as: 　■ For job search: resume-writing, interview skills, etc 　■ For onboarding: needs help with basics like getting comfortable with email 　■ For during employment: basic workplace skills such as keeping to schedules, filling out administrative paperwork, maintaining boundaries with colleagues and clients, etc
Work experience	■ No employment in past 10 years ■ Limited past employment in customer service
Education background	■ High school graduate ■ No sector-relevant degree, diploma, or certifications
Skills/knowledge	(from lived experience) ■ Navigating social services systems ■ Empathetic communication with people who have experienced trauma and mental health challenges ■ Understands challenges of moving from chronic homelessness to housing ■ No relevant formal training/education
Career goals and interests	■ **For now:** occasional work hours, roles that involve drawing on lived experience (but not yet full-fledged professional peer support); providing informal mutual peer support among his neighbours in the building ■ **Future:** interested in becoming a part-time long-term peer support worker / peer supporter
Other possible barriers	■ On ODSP and OW, so needs to keep earnings low enough to avoid losing needed benefits

1.6 Shelter Employment for People with Lived Experience of Homelessness vs. Other Related Experiences: Distinct Benefits and Challenges

In this Toolkit, we use a broad definition of lived experience (see **Defining Key Terms**, p. 9) and this toolkit is relevant for shelter employment of people with any of these experiences. Nevertheless, we recognize that in the shelter sector, initiatives focused on employment of people with lived experience specifically of homelessness have unique complexities, and have benefits that are distinct from those of shelter employment initiatives that are focused on people with other types of LE.

Benefits of Employing People with Lived Experience of Homelessness

Benefits for clients/residents who are supported by the staff WLE:

It is important to recruit people with lived experience of homelessness; especially those who have had similar types of experiences of homelessness to your clients (chronic homelessness, refugees, people fleeing domestic abuse, emergency homelessness, street homelessness, etc). In interviews and consultations conducted by TSN, as well as prior research, many clients — particularly those who have experienced chronic or long-lasting homelessness — feel that lived experience of homelessness is a distinct, unique experience that is difficult for people to understand who have not been through it, even if they have faced similar life challenges or experiences to shelter residents.

Benefits for clients/residents who are seeking employment:

Employing current or recent past residents of their shelter — or setting up partnerships with other shelters to mutually hire each others' clients — has an added value to many shelters (beyond the value of employing people with other types of LE), because it helps meet an additional goal of supporting their own clients on their journeys to employment, housing, life stability, and/or recovery.

Benefits of Employing People with Other Relevant Lived Experience

Initiatives focused on employing people with mental health or substance use challenges, experiences as refugees, other types of relevant LE are not a substitute for employing people who have stayed in shelters or experienced homelessness; but they are highly valuable for shelters to pursue for other reasons, including:

- Meeting the unique needs of shelter residents who share these experiences

- Creating and filling specialized positions related to certain types of LE, such as overdose prevention peers

- Providing employment opportunities for a broad range of people experiencing marginalization and employment barriers, potentially including clients of other programs or departments at your organization

2 Planning Your PWLE Employment Initiative: Tools for Visioning and Goal-Setting

2.1 About the Tools

This chapter provides basic visioning and goal-setting tools for shelters that are getting started on a new initiative around employment of PWLE. These will help you to:

- Clarify the core goal(s) of your initiative

- Get ideas for specific initiatives to pursue to advance your goal(s)

- Identify some tools within this kit that will be relevant to help you to design and implement the initiative(s) you have in mind

These tools can be valuable whether you are just getting started thinking about employment of PWLE and are trying to figure out where to start; or if you already have a rough concept in mind. The tools are also relevant for all different scales of initiatives: from planning a narrow short-term project, such as a shelter work job fair for your clients; to an organization-wide strategic planning process driven by the Board of Directors and senior management, to establish long-term goals and priorities around employment of PWLE.

These tools can be used by:

- **An individual**, to help you to come up with a proposal to bring forward to colleagues.

- **A project-planning working group**, for brainstorming collaboratively in a structured way; and making sure that everyone involved in the project is on the same page about your purpose and vision.

Toronto shelter-operating organizations participating in the Pipeline Project have identified four major goals that commonly drive shelters' interest in expanding and/or improving employment of PWLE. As the first step of designing your initiative, we recommend that your planning team reach a shared understanding/agreement about how important you consider each of these goals to be for your organization and/or for the specific project.

Goal 1

Creating employment pathways or positions for your shelter clients/residents, particularly those with barriers to employment

Goal 2

Building a team where staff at all levels mirror the LE and identities of the communities you serve and engage

Goal 3

Filling gaps in shelter staffing through recruitment and retention of PLWE

Goal 4

Improving experiences and outcomes for your staff WLE

Note: if the primary purpose of your initiative is Goal 1: creating employment or positions for your shelter clients/residents we recommend exploring **Tool 2B** Types of Shelter Roles/Jobs: Deciding What You Want, p. 34 and **Tool 2C** Types of Shelter Roles/Jobs: An Overview, p. 35. These are particularly relevant if you are considering:

- Creating a peer program or position (where the roles require drawing on lived experience)

- Creating a traineeship or work placement program (where participants must have LE, but don't necessarily have to actively draw on it when doing their work)

- Designing a special frontline or management job designated for PWLE

- Creating any other type of position or employment program designated for PWLE

- Helping your clients/residents (or other PWLE) to more easily access general shelter job opportunities that already exist

Planning Tool for Establishing Priority Goals and Visioning Initiatives to Achieve Them (p. 1/3)

Identifying Core Priority Goals

- How important is each of the following goals for your organization?

- How much of a priority do you want it to be for the current initiative?

The next two pages provide some strategy tips to each goal.

Once you have decided on the issues/topics you wish to focus on in your initiative, you can explore the Toolkit[1] to find relevant chapters, best practices tipsheets, and practical tools. See:

- Table of Contents, p4

- B1 List of Tools from Other Sources Included in Appendix B, p. 127., a list, organized by topic, of the materials that have been included in Appendix B: Copies of Tools from Other Sources, p. 126

- Appendix A: Annotated Bibliography, p. 116 for suggestions of other documents to explore

Goal 1
Creating employment pathways or positions for shelter clients/ residents, particularly those with barriers to employment

Goal 2
Building a team where staff at all levels mirror the lived experience (LE) and identities of the communities you serve/engage

Goal 3
Fill gaps in shelter staffing through recruitment and retention of people with lived experience (PWLE)

Goal 4
Improving experiences and outcomes for your staff with lived experience (WLE)

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1   If you are reading this "Planning Tool for Establishing Priority Goals and Visioning Initiatives to Achieve Them" as a standalone 3-page handout: please note that you can find the complete *Employment of People with Lived Experience: a Toolkit for Shelter-Operating Organizations* at www.torontoshelternetwork.com/ shelter-sector-pipeline. All of the recommended tools referenced throughout this "Planning Tool" can be found in the Toolkit, at the page numbers provided.

Tips and Tools for Addressing Priority Goals #1 and #2

Goal 1

Creating employment pathways or positions for shelter clients/residents, particularly those with barriers to employment

Assess goals, interests, and needs of clients/residents around employment in shelters. This includes consulting/surveying:
- » Clientele of participating shelter(s) to help you design the program (see **Tool 7E** Peer Work: Client Survey, p. 112),
- » The individual participating clients, to help plan their personal journeys

Assess organization's capacity to:
- » **Provide a welcoming and equitable workplace** for PWLE
- » **Provide supports**, supervision , and accommodations
- » **Conduct inclusive recruitment and hiring processes**

Decide for whom you want to expand employment opportunities:
- » What types of LE?
- » Any specific demographic groups?
- » Where should they be in their journey in terms of housing stability, employment readiness, and/or recovery?
- » Past/present residents of your shelter? And/or of other organizations?
- » (See **1.5 The Diversity of People with Lived Experience Relevant for Shelter Work**, p. 20)

Goal 2

Building a team where staff at all levels mirror the lived experience (LE) and identities of the communities you serve/engage

Find out which types of lived experience, identities, or demographics that are common among your clients/residents **are underrepresented** on your staff team: (See **1.5 The Diversity of People with Lived Experience Relevant for Shelter Work**, p. 20 for ideas and **Tool 6B** During Employment Best Practices #2: Other Supports and Career Advancement, p. 88 for a tool to adapt)

Assess organization's capacity to:
- » **Conduct inclusive recruitment and hiring processes**
- » **Provide a welcoming and equitable workplace** for PWLE
- » **Provide supports, supervision , and accommodations** (Lower priority if the initiative does not also have goal of providing employment for people with significant employment barriers)

Which types of staff roles do you feel are most important to focus on at this time?
- » Frontline staff
- » Site supervisors
- » Senior management
- » Human resources
- » Other roles

Tips and Tools for Addressing Priority Goals #3 and #4

Goal 3
Fill gaps in shelter staffing through recruitment and retention of PLWE

Consider whether you **are trying to address overall staffing shortages, or fill gaps in the type of services** that you provide

If general shortages: identify where the problem is arising in the process:
» Too few applicants?
» Applicants don't meet current required/desired qualifications?
» Retention issues?

Determine whether you're seeking to address temporary or long-term staffing shortage – or both.

Assess **inclusiveness of current recruitment and hiring processes**

Identify unmet client/residents needs that you could meet by creating (or increasing # of staff in) types of jobs that PWLE are particularly well-qualified for? (see **Tool 2C** <u>Types of Shelter Roles/Jobs: An Overview</u>, p. 35) For example:
» Harm reduction
» Housing placement and follow-up support
» Employment goal-setting

Identify ways to improve employment experiences and outcomes for your staff WLE, to improve retention (see Goal 4 on the right side of this page)

Goal 4
Improving experiences and outcomes for your staff WLE

Through a staff consultation/survey process, assess how well your organization is doing at each of the following and decide which issues to address first.(See **Tool B2.3** <u>Fred Victor Staff Survey (to learn about the lived experiences of your staff team)</u>, p. 136 and **Tool B2.2** <u>Scanning Mental Wellness (a healthy work environment evalution)</u>, p. 133)

» **Creating a welcoming, equitable, non-stigmatizing workplace** for PWLE
» **Providing supervision, accommodations/flexibilities, and other supports** that are highly valued by many staff WLE
» **Facilitating career advancement of staff WLE** through ongoing training, career planning supports, and building pathways to advancement within your organization (see **Tool 4D** <u>Recruitment and Hiring Best Practices #3: Recruitment Outreach to PWLE</u>, p. 65); **Tool 6C** <u>During Employment Best Practices #2: Other Supports and Career Advancement</u>, p. 88)

Tool 2B **Types of Shelter Roles/Jobs: Deciding What You Want**

If you are a PWLE interested in shelter work: when going through this flowchart, ask yourself: "What type of role do I want?"

If you are a shelter considering employing PWLE: when going through this flowchart, ask yourself: "what type of position(s) do we want to employ PWLE in?

Role designated for PWLE?

— NO →

General Shelter Jobs: Frontline, Management, and Other

⌐ **General Shelter Jobs** ⌐

YES ↓

Role explicitly requires drawing on the staff member's lived experience?

← YES

NO →

For training and/or gaining work experience?

YES ↓

Role involves engaging with clients/residents?

YES ↓

Traineeships or Work Placements for client-facing roles

NO ↓

Traineeships or Work Placements for non-client-facing roles

Role involves providing emotional, social, or practical support to people with similar LE to the staff member's?

NO →

YES ↓

Role requires significant formal training and/or experience with: the following?

1. Peer support principles and practices
2. Specialized skills or knowledge related to role

YES ↓

Peer Support Work (formal peer support)

NO ↓

Other Frontline Peer Work

Non-Client-Service Peer Roles (eg, community research or organizing)

NO → (from "For training and/or gaining work experience?")

Similar or same responsibilities as staff without LE?

YES ↓

General shelter job, designated for PWLE

NO ↓

Other

⌐ **Peer Roles** ⌐

⌐ **Non-Peer Roles Designated for PWLE** ⌐

Tool 2C Types of Shelter Roles/Jobs: An Overview

Peer Roles

Non-Client-Service Peer Roles (eg, community research or organizing)

→ Community Outreach and Education
→ Community Research
→ LE Advisory Committees
→ Policy Advocacy and Organizing

Other Frontline Peer Work

→ Harm Reduction Peer (eg overdose prevention, education on safe consumption)
→ Health Promotion Peer
→ Mutual Support Group Leader

Peer Support Work (formal peer support)

→ Harm Reduction Peer Lead
→ Housing Follow-up Peer
→ Peer Lead
→ Peer Support Worker (general)

Non-Peer Roles Designated for PWLE

General shelter job, designated for PWLE

→ Same roles as listed under General Shelter Jobs; may have modest differences in:
  1. Qualifications
  2. Responsibilities
  3. Supervision, supports, and modifications available to the employee

Traineeships or Work Placements for client-facing roles

→ Case Management Trainee
→ Frontline Work Trainee

Traineeships or Work Placements for non-client-facing roles

→ Food Service Trainee
→ Maintenance or Cleaning Trainee
→ Non-Frontline Harm Reduction Work (eg, kit-making, needle pick-up)

General Shelter Jobs

Frontline

→ Case Manager
→ Frontline Shelter Worker
→ Harm Reduction Worker
→ Housing Worker

Management

→ Senior Managers
→ Site Supervisor

Other

→ Cleaning, food service, security
→ Human Resources and Admin

3 Organization Change: Laying the Foundations

3.1 Introduction: Organization Change

This toolkit provides best practices recommendations and practical tools related to six core aspects of organization change for expanding employment of PWLE in shelters and facilitating the success and job satisfaction of these staff. We divide these six aspects into two categories. (see **Tool 3A** Organization Change: Laying the Foundations, p. 38, for an infographic.)

1. **Foundational change** (the focus of this chapter): underlying work to prepare a department, site, or organization to be able to launch and sustain successful initiatives to expand and improve your employment of PWLE.
   a. Shifting culture, and values
   b. Increasing organization's knowledge and skills around employment of PWLE
   c. Empowering PWLE within the organization: transforming power structures and decision-making processes

2. **Specific policies, programs, and positions:** (covered in the rest of the toolkit)
   a. Changing policies and practices
   b. Creating programs for employing PWLE, including creating special new positions designated for PWLE
   c. Re-designing "general shelter jobs" - ie, jobs that can also be held by people without LE. This section discusses:
      ◆ changing existing job descriptions (i.e., roles and responsibilities) to make shelter jobs more accessible for PWLE, and/or
      ◆ creating new job descriptions to fill unmet client needs that PWLE are particularly well-positioned to fill

This chapter will:

- **Provide recommendations for shelters to consider around the three types of foundational change**

- **Describe strategies and tactics for conducting a successful organization change** process **that can help shelters to** plan and implement organization change around employment of PWLE

- **Share existing guides/toolkits, specific tools, and curricula from other authors and organizations** that shelters can draw on to support their foundational change work.

The remaining chapters of this toolkit will focus on:

1. **Policies and practices:** recommendations and tools for specific changes to policies and practices related to each stage of the employment pathway
   a. **Recruitment and hiring:** expanding the number and diversity of PWLE who apply and are hired, and matching them to jobs where they are a good fit
   b. **During employment:** ensuring a successful and positive work experience for staff WLE
   c. **Career advancement:** facilitating skills development; and helping people to move into new opportunities if they wish to do so

2. **Programs for Employing PWLE:** recommendations and tools for creating new employment programs and specialized positions designated for people with lived experience

3. **Re-designing jobs:** re-designing or developing new types of "general" shelter jobs (positions open for people with and without LE) where LE is an asset, to make more classes/types of shelter jobs that are accessible for people with various types of employment barriers.

Shifting Culture and Values
» Reducing stigmatization of lived experience (of homelessness, past experience as a client/ participant / resident, mental health or substance use challenges, etc)
» Valuing lived experience as an asset for doing the work
» Building broad commitment (among frontline staff, management, and others in leadership roles) to expanding and improving employment of PWLE

Changing Policies and Practices
around
» Recruitment and Hiring
» During Employment Supports
» Training and Career Advancement

Creating Programs for Employing PWLE
» Peer programs for combining peer work opportunities, training, supportive supervision, mutual support groups for peer workers, etc.
» Traineeships for on-the-job training

Expanding and Improving Employment of People with Lived Experience (PWLE)

Increasing Organization's Knowledge and Skills Around Employing PWLE
» Building capacity of staff and others in leadership roles to implement the new policies, practices, and programs
» Understanding peer work and its potential role(s) in shelters

Empowering PWLE within the Organization
By transforming
» Decision-making processess
» Power dynamics
» Staff team structure

Re-designing Jobs
» Revising job descriptions to make existing roles more accessible to PWLE
» Creating new types of jobs where LE is an asset, to meet unmet client needs

3.2 Foundational Change: Recommendations for Shelters to Consider

Shifting Culture and Values[1]

Based on our primary research and other recent research literature from Toronto, current and aspiring shelter staff WLE feel that one of the most important things for shelters to do to facilitate successful employment of PWLE is to create a workplace culture that is inclusive, non-stigmatizing, and non-discriminatory for peers and other staff WLE. Key points included:

- **Management and co-workers need to:**
  - » **treat staff WLE with respect**
  - » **demonstrate in their words and their actions that they value lived experience** as a source of uniquely valuable knowledge and skills
- **Peers and other staff who have disclosed LE want to be fully integrated into the staff team**, and treated as equals by other staff, in terms of how they relate to and collaborate with each other.

Building an inclusive culture is especially vital for peer workers and other staff in roles where they have to disclose their lived experience, as we have found that there is a high risk that these staff will experience stigma or will not be treated as full-fledged staff.

That said, this culture change benefits other staff WLE as well. When co-workers excel at welcoming staff who have disclosed LE and are able to avoid stigmatization, it creates a more comfortable work environment for all staff with similar lived experiences.

Increasing the Organization's Basic Knowledge Around Employment of PWLE

Ideally, all staff should have a basic understanding of:

- **the benefits of having staff WLE**, for the shelter organization, the clients who are helped, the clients who gain work opportunities in the shelter sector, and for the co-workers themselves.
- **common challenges** that can arise for staff WLE when working as peers and/or in shelters

They should also be trained to carry out:

- **"during employment" best practices** that all staff can follow to create a welcoming work environment for their colleagues WLE, and support them if/when challenges arise

For more details about key shifts to culture and values, and an outline of basic types of knowledge that it is valuable for the whole shelter staff team to gain around employment of PWLE, see **Tool 3B** <u>Sample Curriculum Training for Shelters on Understanding Peer Support</u>, p. 42. This curriculum was designed for organizations that are hiring PWLE specifically for peer support roles, which are positions designated for PWLE where they draw on their own LE to provide social, emotional, and practical support to others with similar lived experience. Nevertheless, it is also relevant for creating a welcoming work environment for all staff with lived experience.

Some staff will need to have—or should be trained to acquire—additional specialized knowledge and skills related to recruitment, hiring and employment supports for PWLE. This includes staff who:

- work in the human resources department; and/or
- are involved in recruitment and hiring processes; and/or

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1   The third part of this, shifting/setting priorities, is covered in the next section of this chapter, 2.3 - Organization Change: Process Recommendations.

- are directly responsible for onboarding, supervising, or supporting staff WLE, especially staff WLE who are in LE-designated roles, or who have requested special supports, accommodations, or flexibilities

The following chapters of the toolkit offer best practices recommendations, practical tools, and lists of tools from other sources, which can help staff who have these types of roles/responsibilities to identify, develop and implement key skills.

- **Chapter 3: Recruitment and Hiring**
- **Chapter 4: Onboarding**
- **Chapter 5: During Employment and Career Advancement**, which covers:
  » Supervision, Accommodations, and Other Supports
  » Ongoing Training and Career Advancement

Empowering PWLE Within the Organization: Transforming Power and Structures

Shelters need to make sure that:

1. **the voices of PWLE—both clients/resident and staff WLE—are heard** in their organization's planning processes; particularly the planning of peer programs

or other initiatives related to employment of PWLE[2]; and

2. **there are people with lived experience in positions of power** and influence within the organization, including the Board of Director and senior management.

Doing this makes it more likely that employment of staff with lived experience will:

- be made a strategic priority for the organization;
- remain on the organization's agenda for the long term, even in the face of setbacks or competing priorities; and
- be carried out in a way that is fair and successful for everyone involved, including staff WLE, clients/residents, and the shelter organization

As Toronto Shelter Network engages with Champion Employer shelters around organization change during Phase 2 of the Pipeline Project, we will collaboratively develop more in-depth best practices for shelters on how to achieve this type of empowerment successfully within the constraints created by:

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2 Note: This toolkit is focused on paid employment of people with lived experience in shelters; so we do not have an in-depth discussion of best practices for how to equitably and impactfully engage PWLE in roles on advisory committees or members of boards of directors. For some valuable insights from PWLE about best practices for engaging PWLE in an advisory capacity for projects and organizations in the homelessness sector, see:

Mental Health Commission of Canada, National Consumer Panel of the At Home/Chez Soi Project. (2011). Stigma, discrimination, and PWLE knowledge: Discussion report. housingfirsttoolkit.ca/wp-content/uploads/Stigma_Discussion_Report_ENG.pdf

1. The pre-existing structures of the shelter system
2. The existing structures and practices of their specific organizations
3. The needs, interests, and abilities of shelter clients/residents and other PWLE interested in working in the shelter system.

Relevant aspects of their operations and structures for shelters to self-evaluate and consider making changes to include:

- **Planning and decision-making processes:** what roles, positions, powers, and rights do PWLE (including staff WLE, past or present clients/residents, and other PWLE) have in things like:
  » Organization-wide strategic planning
  » Designing peer programs or traineeship programs
  » Job design for peer positions or general staff positions
  » Hiring committees

- **Power structures:** Do you want to change anything about the roles and powers of the Board of Directors, lived experience advisory committees, and the senior management team? Do you want to create or designate roles for staff WLE or other PWLE within these structures?

- **Staff team structure:** What are the basic classes of jobs defined within your union contract? What is the structure of your organization's hierarchy and who is supervised by whom? Where do peer workers and other staff in jobs

designated for PWLE fit within this?

For example: are peer workers supervised by a shelter site supervisor and classified as a type of frontline worker in the union contract? Or are they supervised by a community engagement coordinator and classified as clients participating in a personal development program that includes a work placement at a shelter site?

For inspiration, you can research and discuss the experiences of shelters in other locales and Toronto organizations in related sectors that were created by people experiencing homelessness and/or other PWLE; and which remain - to varying degrees - governed, managed, or operated by them. Here in Toronto, there is a rich history of organizations that originated as mutual support community organizations but evolved into more formal non-profits that nevertheless retained a commitment to employment and empowerment of PWLE, including consumer-survivor organizations;and VAW[3] shelters.

Toronto shelters can explore the practices these organizations have followed to sustain a resident-empowering structure and culture even as they became more formalized and professionalized; and identify practices that feel feasible for your organization to implement, or to aspire to in your longer-term goals. As we move into Phase 2 of the Pipeline Project, Toronto Shelter Network plans to research and summarize case studies of some of these organizations that have a history of radical empowerment of PWLE. We will provide guidelines to Toronto's shelters about how to draw on some of the creative and transformative practices from these cases, as you pursue your own organization change work.

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3   VAW stands for Violence Against Women, which is an older term that the Province uses to refer to this sector. However in the sector itself, it is common to see "VAW" sector organizations use more broadly gender-inclusive terms, such as "gender-based violence".

Designed by Elizabeth Tremblay, founder of Mentor/Mentee Canada

Background

Elizabeth Tremblay is the founder of Mentor/ Mentee Canada and an experienced peer supporter and peer trainer.

Part of her work is designing and delivering trainings for organizations that are going to host or hire peer supporters, to help the existing staff teams to better understand what peer support is, why it's important, and how to create a welcoming work environment for peers. Below is a sample curriculum that she designed.

Elizabeth also runs trainings for PWLE of homelessness who are interested in becoming peer supporters working in the homelessness sector, or other sectors that relate to their lived experience, such as reintegration peer support, and mental health organizations including both medical-model hospitals and PWLE-led mental health organizations.

Note: peer supporters are a particular type of staff with lived experience who provide social, emotional, and practical support to clients/residents with lived experience

similar to their own. They ideally have specialized training in how to effectively draw on their lived experience when providing support; and they disclose the fact that they have LE to clients and coworkers. Often the fact that they have LE is evident due to the term "peer" in their job title.

That said, the core topics covered in this training are relevant for creating a welcoming work environment for all staff with lived experience. This is particularly important for staff in roles that are designated for PWLE where they are expected to disclose their lived experience, as these staff have a higher risk of experiencing stigma, or exclusion from full participation in the staff team.

Moreover, it's highly valuable for all staff to integrate peer support skills and principles into their work, regardless of whether they identify as having lived experience, and regardless of whether they're in a peer role, because it helps them to:

- more effectively support clients/residents
- maintain their own wellness amidst the stresses of the shelter work environment

Curriculum Outline

Note: Mentor/Mentee uses the term "Peer Supporter" to refer to the staff member WLE, and "Peer" to refer to the person with similar lived experience that they are supporting.

Here is an overview of what this training involves:

Understanding Core Peer Support Principles and the Benefits of Peer Support

List of key topics for a training for shelters for understanding Peer Support:

- Engagement
- Connection
- Relationship
- Recovery
- Community

Each topic goes through the qualities/ character traits of a Peer Supporter; the skills and tools used; what their benefits are for both the Peer and the Peer Supporter Training participants also learn about how Peer Support skills and principles can be (and are) adopted by all staff in Toronto shelters - regardless of whether they

have lived experience and/or are in an explicitly peer role - Toronto to support:

- An organizational culture that [INSERT KEY CHARACTERISTICS OF AN IDEAL org culture that meets the needs of all staff,

- Staff wellness and burnout reduction especially during change-management (processing emotion and taking action to change behaviours, opening to connection and new relationships, coping, learning and adapting to change).

This training itself will create the change needed for a welcoming work environment for Peers because in it, all of the communication skills are there to interact in a healthy, learning and productive shelter service team.

Structured Peer Programs

Creating a welcoming work environment for Peers and other staff WLE through a well-structured Peer Program is extremely valuable. Creating a physical space that meets Peer Supporter needs

- Peer Supporters have
  - » space for conducting one-on-one Peer Support with

privacy/confidentiality (without Staff disruption, quiet)

- Communal space/supplies for Peer shared or group Program structured orientation of Peers to the Peer Support Program - co-designed with Peers if possible) and how Peers will access Peer Support (sign up sheet, appointments, communal times).

- Peer Supporters co-facilitate a Peer Support Orientation along with shelter staff member(s)

- Informal Welcome Session with team introductions (informative and creative co-designed with Peer Support Lead) to get to know the broader shelter staff team that they will be working with, and make sure everyone understands each others' roles and responsibilities.

- Peer Supporters Session to bond as a Peer service team

- Peer Supporters decorate their space or meeting room for Peer Support.

Ongoing Training for Shelter Staff Team from Their Peer Supporter Co-workers

Peer Supporters provide Staff with information sessions (post startup of Peer Program) to support continual

practice of self-care, self-awareness, and learning skills related to Peer Support.

Best Practices for Non-Peer Staff for Integrating Peer Supporters into the Team

Staff will be trained on how to:

- Work on overcoming bias and judgment to be a collective team with Peers especially in their communications:such as looping in Peer Supporters on emails to feel included and informed while working on Client recovery as a part of the primary care team, as well as including Peer Supporters in verbal interactions regarding shared Client load).

- Work on avoiding oppressive language and behaviours (exclusion)

- Understand low self-esteem that staff WLE may experience from a history of being "othered', feelings of worthlessness, compounded trauma and abuse

- Learn to be mindful of their side-conversations. It is important for them to be aware that when they speak about Clients, they are also speaking about Peer Supporters and other staff WLE.

- Be open to learning from Peer Supporters as a collaborative model and

- Understand that Peer Supporters are working on healing core root issues of the Peers (clients/residents) that they support to enable recovery and support healthy behavioural change; and

- Understand that a core principle of Peer Support is working toward social justice and broken system change; it's not only about helping individuals

Ongoing Training: Beyond the Orientation Prior to the Start of the Peer Program

Developing the capacity of staff to implement these best practices consistently will require significant practice and ongoing training and self awareness-raising. It is recommended that:

- Shelters regularly provide ongoing staff training about overcoming stigma, oppression and avoiding tokenism and discussing this with the Peer Team for mutual learning. This can happen on-site, at a partner organization, or online.

- Shelters provide tools/resources and funding for staff to engage in further learning on their own, such as through courses at the Toronto Hostels Training Centre, and reading written sources.
  - » This supplemental learning is particularly important in shelters, where the diverse and variable schedules of staff in a 24-hour sector can make it challenging to provide on-site trainings on a regular basis that staff are available to attend
  - » For recommended written resources see the list of **Resources on Peer Work in the Homelessness Sector and Other Social Services** in the Annotated Bibliography.

- Cultural Safety - learning from Peers and Clients for cultural understanding of one another to improve our interactions and service

- Eventually include a Peer coach in human resources for staff wellness and resilience

3.3 Process Recommendations for Organization Change

Starting Organization Change: Top-Down and Bottom-up Approaches

Top-Down Approach: Establish Employment of PWLE as a Strategic Priority for the Organization

In most organizations, this type of initiative would be driven by the Board of Directors and/or senior staff, with some consultation and engagement of other stakeholders.

- Step 1: **establishing employment of PWLE as an overall strategic priority** for the organization, perhaps as part of your overall multi-year strategic plan development.

- Step 2: **develop a plan to achieve this priority**, by setting specific goals and planning initiatives (See Chapter 2: Planning Your PWLE Employment Initiative: Tools for Visioning and Goal-Setting, p. 29 for tools to help guide this). An effective approach involves creating a diverse working group involving representatives of as many relevant groups as possible from senior management to clients/residents (see Consultation and Engagement, p. 46)

A staff survey is an important part of this planning process, to learn about lived experiences of your staff team, and the current workplace experiences of staff WLE who work at your organization. This will help you to evaluate the current working conditions for, and needs of, staff WLE at your organization. We recommend repeating a similar survey periodically over the years to assess progress.

- See **Tool B2.3** Fred Victor Staff Survey (to learn about the lived experiences of your staff team), p. 136, as an example

- See Fred Victor (2013), pp 8-10 for guidance on effective methodology for surveying staff at a shelter-operating organization, including strategies for maximizing response rate and reducing confidentiality concerns.

Bottom-Up Approach: Small-Scale Pilot Projects

Building organization-wide transformation through a formal strategic planning process can take a long time, especially for large organizations. Before or during these long-term transformational initiatives, it is possible for departments, sites, or groups of staff with a strong interest in expanding/improving employment of PWLE to pilot small-scale initiatives that do not require permission from such a large range of stakeholders. These would likely be:

1. Initiatives focused on implementing some of the recommendations flagged in the Best Practices Tipsheets as "small-scale projects or minor changes to policies/practices".

2. Pilot peer programs or traineeship programs contained within a particular site or department

Organizations can then follow an iterative process, testing out a project or change on a small scale, evaluating outcomes, making changes, then implementing more broadly across the organization.

Even for small-scale initiatives focused on a narrow set of goals, a limited set of sites, or engaging only a small number of PWLE, the three key types of foundational changes are still essential, just at a smaller scale. They will only need to engage the specific staff members , departments, groups of clientele, and/or other stakeholders and decision-makers whose contributions, co-operation, and/or authorization will be essential for success. Depending on the nature of the project, conducting staff surveys may be valuable with this limited group as well.

Bringing Both Approaches Together

Ideally, organizations will combine organization-wide strategic transformation efforts and pilot project approaches. The decisions made by strategic planning can inform the design of pilot projects, and the outcomes of pilot projects can inform the establishment of organization-wide priority-setting, initiative-planning, and policy development. You can start with either approach, or launch both simultaneously.

Starting with smaller-scale projects is often a good approach in organizations where the initial interest is coming from a particular site or department; or is driven by non-senior staff, such as community development/engagement coordinators, site supervisors, peer workers, or other frontline staff. These limited-scope projects can be a great way to build interest and capacity within the organization around employment of PWLE. This can ultimately increase senior staff openness to making it a strategic priority; and put the organization in a good position to implement organization change successfully in the future..

In the long run, organization-wide - and sector-wide - foundational change initiatives with widespread buy-in will be needed to:

- **Ensure that initiatives around employment of PWLE in each organization are understood, supported, and implemented widely and sustainably** by all sites and departments; and by people in all different types of roles at all levels of the organization, from clients to senior management

- **Address all stages of the employment pathway**, so PWLE who are interested in careers in the shelter organization are supported throughout their journey and don't get stuck involuntarily at a particular step in the employment pathway when they are ready to move to the next step; or find themselves stalled in their career path, if they wish to move on - or return back - to a different type of work opportunity in your organization, the shelter sector, or beyond.

- **Expand and improve employment of PWLE within Toronto's shelter system on a large enough scale that it becomes possible to:**
  - » create job opportunities for a large percentage of interested PWLE
  - » alleviate staffing shortages
  - » make support from peers and other staff WLE a standard part of shelter services that positively impacts client/resident outcomes and in-shelter experiences.

Consultation and Engagement

To successfully plan and implement an organization change initiative, it is important to engage a variety of groups that will be involved with or impacted by the changes, including: PWLE, staff at all levels of the organization and in all relevant departments, decision-making and advisory bodies at your organization that have authority over or interest in the matter at hand, and external partners. The groups of key players involved and what you need from them will depend on the scale and type of initiative. Whatever the scale of the initiative, it is key to consider the following questions- both when planning the project or making policy changes, and during implementation:

1. Who needs to give **permission**?

2. Who needs to be **involved in planning and coordinating** the change initiative?

3. Who will need to be **informed, and persuaded** to follow the new policies and practices?

4. Whose **attitudes/values/knowledge need to shift** to achieve the desired outcome?

Common relevant stakeholders include:

- **People with lived experience:**
  - » Past and present shelter clients/residents
  - » Advisors with relevant lived experience
  - » Peer workers
  - » Frontline workers WLE
  - » Non-frontline staff WLE - management, human resources, administration

- **Other shelter staff:**
  - » Frontline coworkers of staff WLE
  - » Frontline supervisors of staff WLE
  - » Senior management
  - » Human resources departments

- **Decision-making/power-holding bodies at your organization**
  - » Board of Directors
  - » Union

- **External partners:**
  - » City of Toronto - SSHA
  - » Toronto Shelter Network
  - » Peer work expert organizations
  - » Training organizations
  - » Employment services providers

Organization Change: Learning Opportunities and Approaches

1) Written guides: A number of organizations in Toronto and beyond have developed excellent and comprehensive written guides for organizations on employing staff WLE, and/or how to design and implement peer programs and other work opportunities designated for PWLE. These include more in-depth recommendations for how to create a work environment where peer workers and other staff WLE can thrive. (See **A2** Full Toolkits/Guides from Other Organizations on Employment of PWLE, p. 124). Shelters are likely to find it helpful to:

- draw on these documents to inform foundational change processes around transforming culture, values, and knowledge

- share key tips and practical tools from these documents with staff and other stakeholders

2) Interactive Trainings, Co-facilitated by PWLE:
Even the best written materials are not a replacement for interactive training programs, co-facilitated by PWLE or with PWLE speakers. Meeting PWLE, getting to know them, and experiencing their skills firsthand has a deep impact that can't easily be achieved simply by reading about the importance of avoiding stigma and recognizing the value of lived experience.

A number of Toronto organizations and individuals have developed curricula for short-term PWLE-led trainings oriented toward building a culture of valuing staff WLE, creating a welcoming workplace, and learning how to work successfully with peers and other staff WLE as co-workers. They have delivered these trainings for staff teams at shelters and other organizations in the homelessness and mental health sectors, and gotten positive feedback from participants. (See **Tool 3B** Sample Curriculum Training for Shelters on Understanding Peer Support, p. 42).

As an added bonus, these trainings also train staff in core peer support principles and skills that they can apply in their own work with clients, regardless of whether these staff have lived experience or not, and whether they are in"peer" positions or note. This helps them to:

- more effectively support clients/residents

- maintain their own wellness amidst the stresses of the shelter work environment - which is a challenge for all staff, not just those WLE

Similar programs/trainings have also been developed by organizations in other locales, some of which are available online.[4]

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4   Before publishing the next iteration of this toolkit, we plan to create a directory on our website with information about specific training opportunities and links to their websites, and we will add a link to the directory here.

Due to the 24-7 nature of shelter work, variable staff schedules, the large staff teams at many shelter-operating organizations, and high turnover, providing organization-wide staff training can be challenging in the shelter sector, but there are some creative solutions that can be implemented, often through collaboration with external partners.

Challenges	Solutions
When scheduling trainings, it can be difficult to find times that work for all (or even most) staff: ■ For one-off workshops, it is impossible to find one time that will work for most people ■ For multi-session courses, there is no guarantee that a particular group of people would be available at the same time for multiple days or weeks in a row	■ When holding trainings for your staff team, **offer each workshop or session multiple times** in a week/month; ■ Offer courses multiple times per year ■ **Provide online or hybrid options**, ideally including some live instruction from and engagement with PWLE (live online or in-person)
■ **Few shelters have in-house staff with the skills, knowledge, and availability to design, coordinate and run these trainings**	■ **Partner with organizations with the necessary expertise in designing and running these trainings**; and/or who can facilitate a co-design process to develop a targeted training to meet your organization's needs ■ **Partnering with other shelters to organize staff trainings**, to minimize the administrative burden on each shelter
■ **Most shelters rely heavily on relief staff**, who work only occasionally, don't remain involved long-term, or are employed by external staffing agencies.	■ **Partnering with staffing agencies** that shelters commonly rely on, **to provide training to their staff** around how to create a welcoming workplace for staff WLE, and work successfully with peers and other staff WLE as coworkers.
■ **Relief, part-time, or short-term contract staff often work at variety of shelters with different cultures and values** (whether at the same time, or in succession over a short time period) ■ These staff don't have as much time at your shelter to absorb and adapt to the culture	**Find out which shelter organizations are the most common additional workplaces of people working at your sites**, by ■ Asking staffing agencies ■ Surveying relief and PT staff who work at your sites **Collaborate with those shelters on organization change**: ■ Run joint trainings for relief workers and part-time staff ■ Collaborate on sector-wide organization change efforts so new policies and practices are put in place at multiple shelters at similar times, making it easier for staff to adapt if they work at multiple locations or change jobs frequently

3) Learning and Collaborating with Other Toronto Shelter-Operating Organizations
It is valuable for organizations to get together regularly with other shelters working on similar initiatives, to support and encourage each other, share successes and challenges, brainstorm ideas, and/or plan multi-organization initiatives.

At a Pipeline Project Visioning Session, TSN Peer Champion Team Lead Edward Perreira pointed out that "we are at different places but have similar goals". He recommended pairing up shelter organizations that are just getting started with others that are farther along, to learn from the experiences of shelters that have spent many years developing and implementing organization-wide initiatives to create a work environment where staff WLE can thrive, and have successfully attracted and retained more staff members with a diverse range of lived experiences and identities to build a staff team that reflects their client/resident community.

4) Learning from Related Sectors with a Strong History Around Peer Work and Employment of PWLE

Other parts of the shelter/homelessness/mental health sector have deep roots in mutual aid; including the VAW (Violence Against Women) shelter sector, and peer-led mental health organizations that grew out of the consumer/survivor empowerment movement. A culture of leadership by, and employment and empowerment of, PWLE remains deeply embedded in many of these organizations, even as they have grown more structured and professionalized. Some shelter sector stakeholders have expressed interest in connecting with organizations from these sectors, and representatives from these sectors have expressed openness to sharing their insights, collaborating on initiatives, and supporting the shelter system's transformation.[5]

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5   Over the course of Phase 2 of the Pipeline Project, we will be putting together a directory of organizations that are interested in collaboration and support, with contact information and a brief description of their interests, which will be updated as needed over time.

3.4 Tools from Other Sources: Organization Change

The sector(s) that these tools are focused on may not overlap precisely with the sector(s) of your organization. They also may focus on types of jobs or lived experiences that do not 100% overlap with those of the staff WLE that you are recruiting and employing. However, the tools still provide relevant insights and can easily be adapted to Toronto shelters' needs.

This list provides the name of the organization, project or author that produced the tool, the year of publication, the pages where they appear in their original document, and (if available) links to the tool inside this PDF and/or URLs for the full original source document. I used the page numbering appearing on the pages of the document, where it existed; otherwise I used the PDF page numbers.

See **A1** Annotated Bibliography: Resources for Further Learning and Practical Tools on p. 117 for more information about the sources. Copies of many of these tools are provided in Appendix B of this toolkit; see **B1** List of Tools from Other Sources Included in Appendix B on p. 127.

Practical Tools: Organization Self-Evaluation

Tool B2.2 Scanning Mental Wellness (a healthy work environment evalution), p. 133

Source: Working Well Together (2010), pp. 22-24

- a tool for evaluating how your organization is doing at creating a workplace that fosters mental wellness for staff

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team), p. 136

Source: Fred Victor (2013), pp.28-32

- Survey tool for organizations to use to:
  - » learn about lived experiences your staff team, and the experiences of staff WLE in your workplace.
- Focus: finding out how many employees have had "personal experiences with homelessness, poverty or other factors that can lead to marginalization"

Best Practices Guidance, Infographics, and Practical Tools on Organization Change: General Principles

Cicero Performance Transformation Process (for organization culture change)

Source: Cicero Institute (2019), p.3

- Diagram of a process for transforming organization culture that the Cicero Group management consulting firm has found to be the most effective for successful and sustained organization-wide culture change

Best Practices Guidance on Organization Change Around Employment of PWLE

Tool B2.1 Developing a Healthy Work Environment, p. 130

Source: Working Well Together (2010), p 17-19

Tool B2.4 Key Focus Areas Infographic, p. 141

Source: Queensland Mental Health Commission – Summary (2010), p. 4-8

- Big-picture recommendations of principles and practices to follow around seven major areas of organization change related to employment of PWLE:
  a. Understanding and defining lived experience roles
  b. Organisational commitment
  c. Workplace culture

  d. Diversity and inclusion
  e. Human resources policies and practices
  f. Professional development and training

Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness), p. 144

Source: Change Toronto (2010), pp. 7-14

- Comprehensive recommendations on increasing and improving equity/success of employing PWLE of homelessness in social services, looking at all stages of the employment pathway and addressing the roles of all stakeholders who would be responsible for making changes (organizations, funders, etc). Covers the following core areas:
  » Develop more inclusive organizational policies and practices

4 Recruitment and Hiring

4.1 Introduction: Recruitment and Hiring

In this chapter, we outline Recruitment and Hiring (R & H) best practices that can expand applications by PWLE, increase the number of PWLE hired, and improve the chances that those selected will be well-suited to their jobs.

The best practices covered in this chapter fall into three categories:

1. Job Postings
2. Evaluating and Selecting Candidates
3. Recruitment Outreach

1. Job Postings
This category is focused on strategies for attracting well-matched applicants WLE by making job postings as encouraging and inclusive as possible, while still accurately representing your organization's current policies and practices around minimum required qualifications and how you evaluate and select candidates

Why this matters:

- If the recommended job posting practices are not followed, candidates WLE who could be a great fit may be deterred from applying.

- If candidates are able to accurately identify which shelters are most likely to be interested in a candidate with their particular combination of qualifications and LE, they can focus on applying to positions where they are most likely to be considered. This saves time and effort for both the applicants and the hiring teams; and reduces the discouragement that candidates can experience when they repeatedly apply to positions for which they are unlikely to be considered, and never even get an interview.

2. Evaluating and Selecting Candidates
This category is focused on changing your selection criteria and candidate evaluation practices. The changes recommended relate to:

a. **Changing minimum required qualifications**, and other criteria for evaluating applications and interview performance, to avoid unnecessarily excluding PWLE who would be great for the job, but lack commonly-expected credentials or experience navigating the job search process.

b. **Valuing – and not stigmatizing – lived experience** when assessing candidates

c. **Practical changes to recruitment/hiring procedures**, such as the way candidates are asked to apply for a job (ie, not just the standard "submit a resume and cover letter"), how you conduct interviews, and whether/how you engage with candidates who were not selected.

Why this matters:

Sometimes, shelters have policies or practices that exclude candidates unnecessarily by setting requirements that are difficult for many PWLE to meet that are not actually essential for success on the job; or that could easily be met through post-hiring training. Excessive requirements can exclude great candidates WLE whose combination of work/volunteer experience, education/training, and lived experience has prepared them well for the position. Everyone loses: shelters and clients miss out on great staff, and PWLE miss out on job opportunities.

On the other hand, shelters need to be realistic about the minimum qualifications needed to do the job, in order to avoid setting new hires up for failure, and creating a challenging situation for these staff members WLE, their clients, their supervisors, and their coworkers.

If people seem like great candidates but are missing essential qualifications, or have high support needs, a shelter should only hire them if the organization is prepared to provide the orientation, ongoing training, supervision, and support necessary to enable the staff to successfully carry out responsibilities that they are not ready to handle on their own at the start; and to enable these staff to build their skills over time so they can eventually meet demands of the job with less support. (For details, see Onboarding, p. 80 and During Employment and Career Advancement, p. 82. Note that some training, supervision, and supports could be provided by an outside partner organization, if your organization has limited capacity to do so internally. For ideas about what these partnerships could look like, see **Tool 7D** Peer Program Partnerships: A Tool for Planning Programs and Coordinating Collaboration, p. 108, **Tool 7C** Peer Program/Position Profiles, p. 103, and *Sample Peer Program/Position Profile: Toronto Shelter Network Community Health Ambassadors*, available on the Shelter Sector Pipeline Project's Resource Page.

If people who are not selected for the position do not do not get any feedback about the reason they were not chosen, they have no way to know what they need to do to improve their chances of getting hired by shelters. Applicants in this situation may end up applying unsuccessfully many times and ultimately become discouraged and give up on entering this career.

3. **Recruitment Outreach**
   This category is focused on active efforts to solicit applications from past/present shelter clients/residents and other target groups of people who share lived experience and identities with your clients/residents.

Why this matters:

Intentionally recruiting a staff team that reflects the diversity of the people using your shelter services is a great benefit to clients/residents. It gives everyone a chance to connect with staff who understand what they are going through; creates pathways to employment in the shelter sector for all groups clients/residents with an interest in this type of career; and inspires them to believe that people like themselves to attain and succeed at work in the sector. For a more in-depth discussion, see 1.5 The Diversity of People with Lived Experience Relevant for Shelter Work, p. 20.

Given the high staff turnover rates in Toronto's shelter system, human resources departments in the sector are often stretched thin. We recognize that this can limit the time and capacity available for planning and implementing new practices. On the positive side, it also creates an opportunity to experiment with new recruitment and hiring practices, assess impacts, make adjustments, and move towards an impactful shift in the composition of shelters' staff teams more quickly than is possible in a low-turnover sector. Taking some time to make these changes is likely to be a good investment in the long run, because it can expand the pool of qualified applicants and improve the fit between applicants WLE and their jobs, which ultimately helps to alleviate staffing shortages.

This chapter is focused on R & H for "general" shelter positions, where PWLE are applying to positions that are also open to people without LE. In the terminology of this toolkit, "general" positions include roles in shelters of any level or specialization, from relief frontline workers to site managers to harm reduction workers, to human resources staff.

The best practices described in this chapter are usually also applicable to roles designated for PWLE, such as peer programs or positions, or traineeships; but there are special additional best practces around R & H for these roles.

For special positions designed for PWLE, the best practices and principles in this chapter usually still apply, but there are some special modifications and additional best practices that are recommended particularly regarding:

- Where the participants are recruited from

- The amount and type of support provided in navigating the application and hiring process

- The way application forms and interviews are structured and the questions that are asked

- The selection criteria.

- For tools and in-depth guidance around recruitment and hiring for these types of positions, explore the guidebooks listed under **A2** Full Toolkits/ Guides from Other Organizations on Employment of PWLE, p. 124.

Who Will Find This Chapter Relevant?

The primary target audience for this chapter is human resources (HR) departments at shelter-operating organizations, as the best practices sheets and practical tools are focused on policy changes, practices, and initiatives that shelter organizations consulted during the Pipeline Project have reported would most commonly be led by HR departments. This chapter is also relevant for other staff who carry out roles/responsibilities commonly fulfilled by HR, such as writing job posts, screening job applications, interviewing candidates, and making hiring decisions.

4.2 Job Postings and Recruitment

Tool 4A Recruitment and Hiring Best Practices #1: Job Postings

Goal: attracting applicants WLE; and helping them identify the right jobs to apply for so they will be more likely to get hired, succeed, and have a good experience at work

STRATEGY 1

Encourage PWLE to apply and make it easy to do so

Note: the difficulty of implementing these "blue" practices varies greatly depending on your organization's policies around job post wording, and who must authorize changes.

Allow application submission by diverse methods – mail, drop-off, fax, email, and web form

Include a statement encouraging PWLE of homelessness and other relevant lived experience to apply

Make the encouragement statement prominent in the job posting

In the statement, **specify the types of lived experience** that are common among your clientele, or relevant for the position

Create an application form as alternative to resume and cover letter, for entry-level and/or peer work roles.

Create and include a statement that explains the strategic priorities of your organization around hiring PWLE, and ensuring diversity and representation

STRATEGY 2

Accurately describe policies and practices at your organization that benefit PWLE

Include a basic statement of commitment to providing accommodations and avoiding discrimination and human rights violations in the **hiring process**

State what applicants should do during the **hiring process** if they have accommodation needs or concerns about human rights violations

Accurately describe any existing policies, supports, and values at your organization that minimize discrimination and stigma and help staff WLE to succeed and have a **positive experience at work**

STRATEGY 3

Use inclusive wording for qualifications and identify lived experience as an asset

Be as inclusive as possible of PWLE, while being sure to accurately represent the evaluation criteria used by the hiring team

Education and work experience requirements in the post should not exceed what the hiring team actually treats as essential

But: **if hiring team treats a qualification as required, don't say it is just an "asset"** or that "equivalent is accepted". Otherwise applicants will waste time applying to jobs they're not eligible for, and get discouraged

If you accept **alternatives to a work or education requirement**, note this, and give examples of equivalent alternatives

State that **personal experience of homelessness or using shelter services is an asset**

State that it is an **asset to have other life experiences** that are common among your shelter clientele, and provide examples

State that it is an **asset to have peer support training and/or a demonstrated capacity to draw effectively on LE** to support others, while maintaining boundaries

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Sample Statements of Encouragement, Accommodation, and Equity	
The samples on this worksheet are examples of statements that Toronto shelters have included on their job postings in order to fulfill one or more of the following purposes: ■ encouraging applications from PWLE and diverse equity-seeking groups; and/or ■ explaining accommodations; and/or ■ stating core organizational values and commitments around these topics	**How to use this worksheet:** ■ to record your own opinions about the statements ■ as a tool for filling in information gathered through a written consultation process (eg, by emailing this sheet to PWLE and hiring managers and asking them to email you their responses) ■ during a working group meeting or focus group, people can share spoken feedback and have the note-taker place their responses in the relevant box ■ at a community consultation, the sheet can be left out on a table for people to fill in their answers.

Sample statement:	What PWLE seeking shelter work like about it:	What shelter hiring managers like about it:
1) FRED VICTOR "[This organization] is also committed to developing an inclusive, barrier-free selection process and work environment. If contacted, please advise the hiring manager if you require any accommodation measures to ensure you will be interviewed in a fair and equitable manner. Information received relating to accommodation requests will be treated with confidentiality. We strive to foster a workplace that reflects the diversity of the community we serve and welcome applications from all qualified candidates; however, only those selected for an interview will be contacted."[1]		

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1   Fred Victor. "24/7 Women's Drop-In Peer Worker". (Job posting for position at Fred Victor, Toronto,ON, 2016).

Sample statement:	What PWLE seeking shelter work like about it:	What shelter hiring managers like about it:
2) PARKDALE ACTIVITY-RECREATION CENTRE "People with life-experience of poverty and contact with the psychiatric system and other marginalized communities are encouraged to apply. [This organization] promotes the principles of and adheres to the tenants of the Ontario Human Rights Code. We strongly encourage applicants from Aboriginal communities, people of all races, colours, ethnic origins, religions, disabilities, and sexual orientations, and lived experience of the mental health system to apply. We recognize that equitable access to employment is an agent in social change."[2]		
3) DIXON HALL *Statement included on all job postings:* "[This organization] is committed to developing an inclusive, barrier-free selection process and work environment. If contacted, please advise the hiring manager if you require any accommodation measures to ensure you will be interviewed in a fair and equitable manner. Information received relating to accommodation requests will be treated with confidentiality. *Special addition for peer worker position:* We want to know about your life experience and the skills that you utilize in your day to day life. If you need support writing this letter please let us know and we can help with support. Let us know how we can get in touch with you."[3]		

2   Parkdale Activity-Recreation Centre (PARC). "Shelter Peer Support Worker". (Job posting for position with Parkdale Activity-Recreation Centre Toronto, ON, June 2022).
     For current job postings, visit: **https://charityvillage.com/search/#results/6316278f1d6e0435e7140af6?kw=&loc=&page_num=1**
3   Dixon Hall. "Community Care Peer Worker". (Job Posting for position at The Rooming House Project of Dixon Hall, Toronto, ON, 2021). For current job postings, visit **dixonhall.org/careers**.

Sample statement:	What PWLE seeking shelter work like about it:	What shelter hiring managers like about it:
4) TORONTO SHELTER NETWORK "Candidates must have a demonstrated commitment to equity, anti-racism and anti-oppression, and to [this organization's] belief that everyone in Toronto can and should live in a home that brings dignity. [This organization] is an equity employer and encourages applications from Indigenous peoples, individuals from racialized groups, people of all sexual orientations and genders and persons with disabilities… In accordance with provincial legislation, accommodation will be provided by [this organization] throughout the recruitment, selection and/or assessment process, upon request, to applicants with disabilities. If you require accommodations during the recruitment process, please contact [email address of hiring manager]"[4]		
5) COVENANT HOUSE #1 "At [this organisation] we believe in a workplace culture of inclusion that is welcoming, respectful and safe for all staff. It is critical to [this organisation's] success to eliminate barriers and promote the inclusion of equity groups. Equity groups have been, and continue to be, underrepresented and marginalized in the workforce, leadership roles, and in some specific occupations. Equity groups include but may not be limited to Indigenous persons, racialized people, gender diverse people, 2SLGBTQIA+ people, and people with disabilities."[5]		

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4   Toronto Shelter Network (TSN). "Executive Director". (Job posting for position at TSN in Toronto, ON, 2022). For current job postings, visit http://www.torontoshelternetwork.com/careers-1
5   Covenant House. "Housing Worker". (Job posting for position at Covenant House, Toronto, ON, posted August 2022). For current job postings, visit covenanthousetoronto.ca/how-to-help/careers

Sample statement:	What PWLE seeking shelter work like about it:	What shelter hiring managers like about it:
6) COVENANT HOUSE #2 "As an employer, [this organization] is committed to building an organization that reflects the diversity of our clients and the communities we serve. We encourage applications from qualified individuals who represent diverse communities. In accordance with the Ontario Human Rights Code, Accessibility for Ontarians with Disabilities Act and [this organization's] Policies on Accommodation, a request for accommodation will be accepted as part of [this organization's] recruitment process."[6]		
7) EMBRAVE "[This organization] is committed to the development of an organization that reflects the communities it serves. We actively encourage applications from members of groups with historical and/or current barriers to equity, including: ■ First Nations, Métis or Inuit peoples, and all other Indigenous peoples. ■ Members of groups that commonly experience discrimination due to race, ancestry, colour, religion, spiritual beliefs or place of origin. ■ Persons of marginalized sexual orientations. ■ Persons with visible or invisible disabilities. ■ Survivors of the psychiatric system/ consumer survivors. ■ Two-Spirit, genderqueer, trans and non-binary people ...We will provide employment accommodation (i.e., an accessible location, technical aids, accommodation during the interview, rescheduling of interviews that fall on religious holidays, etc.) if we are advised of an applicant's needs in advance of any part of the selection process."[7]		

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6   Covenant House. "Day/Evening Youth Worker - Residential Program." (Job posting for position at Covenant House youth shelter in Toronto, ON, posted June/July 2022)

7   Embrave: Agency to End Violence. "1 Full-Time Permanent Resident Counsellor Advocate and 1 Year Full-Time Overnight Resident Counsellor Advocate". (Job posting for two positions at a shelter, in Toronto, ON, June 2022). For current job postings, visit embrave.ca/about/join-our-team.

Sample statement:	What PWLE seeking shelter work like about it:	What shelter hiring managers like about it:
8) WEST NEIGHBOURHOOD HOUSE "[This organization] is actively seeking applications from Indigenous, Black and People of Colour, persons with disabilities, women and persons of all sexual orientations and gender identities/expressions] Applicants with lived experience as a participant of [this organization's] programs, or related programming from similar organizations, are also strongly encouraged to apply. [This organization] will provide accommodation throughout the recruitment & selection process to applicants with disabilities. During any stage of the recruitment process, please indicate the nature of any accommodation(s) you may require. Any information received relating to accommodation measures will be addressed confidentially."[8]		
9) NATIVE CHILD AND FAMILY SERVICES TORONTO ■ "As a multi-service urban Aboriginal agency providing holistic, culture-based programs and services to Aboriginal children, and families, [this organization] will give priority to applicants who identify as First Nations, Inuit, Metis, and those with close affiliations. ■ [This organization] is committed to providing a barrier-free work environment in accordance with the Accessibility for Ontarians with Disabilities Act and the Ontario Human Rights Code. As such, [this organization] will make accommodations available to applicants with disabilities upon request during the recruitment process."[9]		

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8   West Neighbourhood House (West NH). "Mental Health and Addictions Case Manager and Counsellor". (Job posting for The Meeting Place Drop-in at West NH in Toronto, ON, 2022.) For current job postings visit westnh.org/jobopportunities.
9   Native Child and Family Services of Toronto (NCFST). "Transition Houses Relief Worker." (Ongoing job posting for contract - casual position at NCFST in Toronto, ON, 2022.) For current job postins, visit nativechild.org/about-us/careers.

Worksheet #1: Defining Your Goals

Type of Job:	
Target groups of PWLE that we wish to recruit:	

Things to consider before you continue:

When planning changes for the near future:	When planning changes to make in the longer-term future:

Worksheet #2: Evaluating Your Current Job Post Wording

The appropriate wording will vary depending on your current policies, practices, culture, and clientele.

Best Practice	Do we do this?	Would we ideally like to follow this practice in the future, and how high of a priority is it?	What would need to change at our organization (if anything) before we could do this? (for example: the evaluation criteria we use for scoring applicants; human resources policies; union contracts; etc)

Worksheet #2: Evaluating Your Current Job Post Wording

1) **Include a statement encouraging applications from people who have experienced** homelessness and/or stayed in shelter	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	

Best Practice	Do we do this?	Would we ideally like to follow this practice in the future, and how high of a priority is it?	What would need to change at our organization (if anything) before we could do this?
2) **Include a statement encouraging applications from people with other types** of lived experience common among your clients/residents	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
3) **Make the encouragement statement prominent** in the job posting	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
4) In the statement, **specify the types of lived experience** that are common among your clientele, or relevant for the position	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
5) **Create and include a statement that explains the strategic priorities** of your organization around hiring PWLE, and ensuring diversity and representation	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	

Best Practice	Do we do this?	Would we ideally like to follow this practice in the future, and how high of a priority is it?	What would need to change at our organization (if anything) before we could do this?
6) Include a basic statement of commitment to providing **accommodations and avoiding discrimination and human rights violations** in the hiring process	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
7) State what applicants should do during the hiring process if they have accommodation needs or concerns about human rights violations	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
8) **Accurately describe any existing policies, supports, and values** at your organization that minimize discrimination and stigma and help staff WLE to succeed and have a positive experience at work	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
The next three job post best practices should only be incorporated into your posts if: 1. your organization has already created candidate evaluation policies/practices that are aligned with these statements AND 2. hiring teams have been trained to implement them AND 3. an evaluation has been conducted which confirms that they are doing so effectively			
9) If you accept alternatives to a work or education requirement, note this, and give examples of equivalent alternatives	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	
10) State that it is an asset to have personal experience of homelessness, using shelter services, or other types of LE common among your shelter clientele	[ ] Yes [ ] No [ ] Somewhat Comments:	[ ] High priority [ ] Medium priority [ ] Low priority, but might consider it [ ] N/A - we don't want to do this	

Worksheet #3: Designing New Inclusive Language			
Type of Job:			
Target groups of PWLE that we wish to recruit:			
When do want to start using the revised job post wording?			
	Wording we like from other organizations: (for some ideas, see **Tool 4B** Sample Job Post Wording: Worksheet for Exploring Options, p. 56:	**Proposed wording for ours**	**Permission to Use This Wording is Needed From:**
Statements of Encouragement, Accommodation, and Equity			
Qualifications related to lived experience			
Qualifications related to education and work experience			

Tool 4D Recruitment and Hiring Best Practices #2: Recruitment Outreach to PWLE

STRATEGY 1

Recruit your clients & residents

Especially important for peer work roles.

Publicize opportunities in your shelter to current shelter residents; ask site staff and residents which communication channels are most effective (bulletin boards, announcements at meals, etc)

Recruit clients via one-on-one outreach by peer workers, community engagement staff, case managers, site managers, and general frontline staff

Recruit housed former clients/residents, through follow-up housing workers

Recruit clients of other departments of your organization, including employment services, who have LE similar to some of your shelter clients

Loosen policies that ban or severely restrict applications from past/present clients/residents

STRATEGY 2

Recruit current volunteers, peer workers, and other staff WLE into other roles in the organization

Publicize jobs in your shelters to volunteers, student placements, and participants in your peer programs or traineeships

Publicize promotion opportunities to current staff and staffing agency relief workers placed at your sites, and (if organization policies and union contracts permit), encourage them to apply

Classify peer workers as a type of employee eligible to apply for other jobs in the organization as an internal candidate

STRATEGY 3

Recruit clients/residents of other shelters and organizations that work with people with relevant LE

Recruit clients and members of organizations focused on people with similar identities, backgrounds, or lived experience to your clients, especially organizations that provide employment services or have job boards/listhosts

Post jobs on the websites, portals, and email lists of education and training institutions that offer shelter-relevant training to many students WLE

Job fairs for past/present clients that include shelter/homelessness sector employers as a focus

Informational interviews and employer panels with shelter management and frontline staff, for past/present clients

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"Build the pipeline" among the following staff teams/departments within your organizations and/or at partner organizations – create a program or system to continuously support shelter clients/residents and staff WLE along their employment journey, through coordination, "warm" referrals, and information-sharing among the following staff teams/departments within your organizations and/or at partner organizations:

- Human resources and shelter management
- Shelter frontline staff / case managers

- Community engagement staff
- Supportive housing and housing follow-up services

- Employment services
- Education and training providers

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STRATEGY 1

Recognize that relevant lived experience can be an asset, when combined with training/capacity to draw on that experience effectively, and set boundaries

Promote understanding among HR and hiring managers/teams about the value of lived experience in the workplace (Explain how it helps bridge the gap between services and those who use them)

Raise awareness among HR and hiring managers/teams about the value of employee diversity including LE- an inclusive culture that avoids 'us and them' attitude (eg. facilitate trainings that raise awareness of LE to combat stigma and promote diversity and inclusiveness)

Create evaluation/scoring tools and hiring team guidelines that treat LE as an asset - see Strategy 3 on next page

STRATEGY 2

Revise your qualifications/requirements to be more inclusive while still selecting candidates who able to meet job responsibilities, with the training and supports currently available to your staff

When assessing work experience, give significant weight to student placements, volunteer roles, traineeships, or unpaid/short-term peer positions that involved relevant responsibilities for the job

Recognize that non-social services work can provide relevant transferable skills; particularly customer service experience in a fast-paced environment (eg fast food)

For entry-level jobs, if the start date timelines allow - pick the best candidate without regard to whether they'll need essential basic trainings (TSS, First Aid/CPR, SMIS, etc) and pay for these trainings after hiring

Accept "equivalent alternatives" to education requirements, made up of a combination of work experience (including non-social service roles providing transferable skills), volunteer

When revising qualifications, consult PWLE seeking shelter work, and current frontline staff and supervisors, to understand which required or preferred qualifications requirements are creating unnecessary barriers; and which are essential to ensure applicant is prepared to do the job.

Revisit the entire list of qualifications with a multi-stakeholder team including PWLE, to determine which are essential, which are assets, and which are not actually necessary to succeed in the job.

Revise qualifications in these ways to the greatest extent possible for each type of job at the organization, not only peer work or entry-level frontline roles.

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STRATEGY 1

Create candidate evaluation tools that reflect these inclusive qualifications, and train hiring teams to use the tools

Look for signs of lived experience in the resume/ application that will help fulfill desired skills and qualities as outlined in the job description

In any scoring grid or formal guidelines that you use to evaluate resumes, applications and/or interviews, give points/credit for each of the following:

1. Lived experience of homelessness or using shelter/homelessness services
2. Other types of lived experience relevant to your clientele and/or the positions
3. Showing evidence of training or skills regarding how to draw on that LE to support others

Train the team in the evaluation process- how to identify desired skills and experience and assign scores against the given criteria

In evaluation tools, weight lived experience and expertise in drawing on LE equivalently to work/volunteer experience and education

Recognise that typical resume review will not always be successful when identifying and selecting best candidates among PWLE

STRATEGY 2

Welcoming and accessible interview process

When possible, have a staff member WLE or peer staff member present at interviews, for self-identified PWLE, to create a more supportive environment. High priority in interviews for peer roles

The interview environment should not be anxiety inducing and panels should not be intimidating

Tell candidates it is their choice whether or not to disclose lived experience- communicate that it will not affect their candidature (does not apply to positions where disclosing LE is required, e.g. peer supporters)

Communicate to candidates to be interviewed ahead of time what is involved in the process and ensure they understand the interview process

Discuss accommodations with each interviewee in advance and ensure a complete understanding of their needs and limitations and make accommodations if needed to facilitate their success in the interview

Interview questions use neutral, un-coded language, inclusive terminology, and avoids gender, racial, religious, ethnic, or ability bias

Interview questions include multiple appropriate answers or acceptable means of answering the question

Look into informal interviews also (for example, candidates and interviewers sit around the table and written copies of questions are provided)

Always include a PWLE in the interview process

STRATEGY 3

Use a team approach when evaluating candidates, and involve [staff] WLE in the selection process

Create an interview or evaluation committee, train and ensure that they are well versed with the interview protocol for interviewing/evaluating PWLE

Identify who has potential, train and include a PWLE on the panel

STRATEGY 4

Follow up with unsuccessful candidates to improve their chances in the future

Create a form letter to send to all rejected candidates to:

1. Notify them that they have not been selected (to alleviate the anxiety of uncertainty) and
2. Provide information about opportunities for pre-employment supports and trainings, and honorarium work (focus groups, advisories, etc), that are relevant to shelter work and/or peer work; and honorarium work (eg sitting on focus groups and advisory committees)

Provide feedback where possible to support PWLE to deal with rejection and identify areas for development

Connect them to employment support provider (ideally a peer role) to ask them about their talents and abilities and passions, identify opportunities for self-development, and support them in next steps.

Minor project: small changes to policies and practices

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Large project: major changes to policies, culture, or organization structure

How to Use the Applicant Assessment Grid for Frontline Shelter Positions

Purpose:

Tool 4F Applicant Grid for Frontline Shelter Positions, is a grid for scoring the resumes/cover letters of applicants to a "general shelter job". It is not a specialized tool for evaluating applicants with lived experience (WLE), but it has features that are designed to

- increase the chances that candidates WLE will be selected for an interview; while still

- accurately identifying candidates that have a strong chance of getting hired under your current candidate evaluation and selection policies and practices

Recommendations:

- We recommend adapting this tool to match your organization's staffing needs and candidate evaluation policies/practices; and that you modify it on an ongoing basis to reflect any best practices that you adopt to make your recruitment and hiring process more inclusive of PWLE, around things like:
  - » job post wording
  - » job design/descriptions
  - » Candidate evaluation and selection methods and criteria.

- As-is, this tool is most suitable for shelters that are at an early stage of transforming your recruitment and hiring practices to expand hiring of PWLE.

Limitations:

Caution: this scoring grid is not recommended for evaluating candidates for peer worker positions or other specialized roles designated for PWLE, as the appropriate criteria and evaluation methods for candidates for these positions are very different from what is appropriate for general shelter jobs. Excellent recommendations and tools around applications and candidate evaluation for peer work positions are available in the peer work guides/toolkits on this resource list in **A2** Full Toolkits/Guides from Other Organizations on Employment of PWLE, p. 124.

Scoring Guidelines/Notes for Application Reviewer

For work and volunteer experience

Paid work experience, student placements/internships, or substantial/ongoing volunteer roles all count, though when counting # of years, may want to count less if the role sounds like it's very part-time or involves minimal responsibilities.

For education credentials

"Equivalent experience" would be something like taking some courses toward these degrees/diplomas, plus 1+ years of full-time work. Basically, it implies that you feel their missing formal education credential is unlikely to impact their ability to do the job well.

For "Knowledge/Skills" section

To assess this, consider all types of lived experience, work, volunteer, and educational experience mentioned in the resume and cover letter that could help develop this knoweldge/skills, as well as knowledge demonstrated directly in what they wrote in their cover letter.

For lived experience section

"Peer support" means providing emotional, social, or practical support to people with lived experience similar to one's own.

Sample Candidate Summaries

Candidate 1

Given experience working in the sector and past education I believe would be a good fit. Has experience working at a youth shelter in another Canadian city as a hostel support worker. Has additional experience working at another shelter and was a Team Leader on the outreach team for the Keep Cool Program, a program that employs PWLE.

Candidate 2

They have 3 years experience in the sector as a Street Needs Assessment Outreach Worker, Housing Follow-up Worker at a Toronto shelter and supportive housing organization, and Relief Community Shelter Worker at a Toronto shelter. Their most relevant education consists of a Community Worker diploma.

Candidate 3

This person is an intriguing candidate as they are a recovering addict that has done community outreach to detox centres, prisons, etc. to share their story. They are very academically focused and don't have any additional relevant experience. Candidate's customer service experience includes Guest Experience Leader at a chain restaurant. I think with the right training, they could do well.

Candidate 4

This person is best suited for a refugee specific shelter, like Christie Refugee Welcome Centre or COSTI. Although they don't have experience working in the shelter system in Toronto, they did work at a community centre with immigrant seniors and women, and have lived experience as a refugee.

*Caution: this scoring grid is not recommended for evaluating candidates for peer worker positions or other specialized roles designated for PWLE, as the appropriate criteria and evaluation methods for candidates for such positions are different from what is suitable for general shelter jobs.

Instruction:

- Rate each applicant on each qualification in the first column, using the scale in the second column.

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Applicant's Name				
Work and Volunteer Experience	For these, "equivalent" means - combination of work/volunteer experience and education			
Frontline work or volunteer experience directly supporting individuals experiencing homelessness, housing insecurity, mental health issues or addictions, trauma, refugee experiences, or marginalization	0 = none 1 = some but less than 1 year 2 = 1-3 years 3 = more than 3 years			
Experience helping individuals and families experiencing homelessness with shelter or respite centre activities.	0 = none 1 = some but less than 1 year 2 = 1-3 years 3 = more than 3 years			
Customer or client service experience (any industry or sector)	0 = none 1 = some but less than 1 year 2 = 1-3 years 3 = more than 3 years			
Experience as a peer worker (paid or unpaid); or other experience providing peer support related to homelessness, supportive housing, mental health, addictions, or similar.	0 = none 1 = informal peer support 2 = formal position (less than 1 year) 3 = formal position (1+ years)			
Experience in case management, researching resources and making referrals for clients, or similar social service work.	0 = none 1 = some but less than 1 year 2 = more than 1 year			

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Experience working in medical settings and/or following/enforcing protocols to prevent spread of infectious disease	0 = none 1 = some but less than 1 year 2 = more than 1 year			
Education				
Diploma, Degree, or Certificate in: Social Work, Human Services, Addictions, Mental Health, Community Worker, Child and Youth Worker or equivalent combination of education and experience (specify and give score)	0=No 1=Degree/Diploma/Certificate - unrelated field 2 = Some coursework - program not completed - in relevant field 4= Degree/Diploma/Certification, or equivalent - in relevant field			
	List degree(s) or partially-completed programs. For individuals without a degree/diploma/certificate, describe their equivalent combination of education and experience.			

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Has other relevant certifications or training (specify and give score)	0 = none 1= one 2 = more than one			
	List other relevant certifications or training (e.g., Standard First Aid, CPR, Toronto Shelter Standards, CPI, Case Management, Anti-racism/Anti-oppression, Documentation (Note Taking) Skills, WHMIS)			
Knowledge and Skill	Based on general impression from the application, rate the candidates on each qualification:			
Knowledge of homelessness and poverty issues, and how they relate to mental and physical health, substance use, or trauma	0 = low 1 = moderate 2 = strong			
Demonstrated skills in crisis intervention and conflict resolution	0 = low 1 = moderate 2 = strong			
Demonstrated problem-solving and decision-making skills under pressure	0 = low 1 = moderate 2 = strong			
Demonstrated ability to foster and maintain a trauma-informed approach	0 = low 1 = moderate 2 = strong			
Experience providing harm reduction services and/or overdose prevention, and maintaining a harm reduction framework in their work with clients	0 = low 1 = moderate 2 = strong			

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Knowledge of community based resources for low income people in Toronto	0 = low 1 = moderate 2 = strong			
Interpersonal skills and ability to work as a team	0 = low 1 = moderate 2 = strong			
Ability to work on their own with little supervision	0 = low 1 = moderate 2 = strong			
Demonstrated experience/skills working within a diverse ethno-racial, multi-lingual community setting	0 = low 1 = moderate 2 = strong			
Written communication skills in English.	0 = low 1 = moderate 2 = strong			
Understanding of issues related to anti-oppression and services for trans individuals	0 = none 1 = some 2 = a great deal			
Knowledge/Experience with Specific Populations Use any that are relevant for your organization. If you are conducting a recruitment effort for multiple shelter-operating organizations, you may want to use these factors to help match them to shelters that a good fit, rather than including them in the total score.				
Knowledge and/or experience with Indigenous culture and history	0 = none 1 = some 2 = a great deal			
Knowledge and/or experience with other specialized populations/demographics (racial, cultural, ethnic, dis/ability, LGBTQ, gender, age group, etc) - please specify	List all relevant populations/demographics			
Demonstrated competency in the issues of gender-based violence and women who have faced systemic barriers	0 = none 1 = some 2 = a great deal			

Applicant Assessment Grid for Frontline Shelter Positions (p. 7/8)

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Do they speak French, and how fluent are they?	0 = No French 1 = basic 2 = moderate proficiency 3 = fluent			
What languages do they speak besides English or French, and how fluent are they?	List languages and (if provided in application) proficiency level 0 = no other languages 1 = basic proficiency 2 = moderate proficiency 3 = fluent For example: Mandarin - 1 Spanish - 3			
Other				
What sites (if any) did they say they do not want to work at?	List shelter names			
What shelters (if any) are they especially interested to work at?	List shelter names			
Sector preference(s)	Fill in if stated in the application by the candidate			
Geography preference(s)				
Minimum hours				

ID CODE	Scale	Applicant A6	Applicant B6	Applicant C6
Maximum hours				
Part time **Full time** **As-needed relief**	List all they stated willingness to do.			
Recommended sector(s): **Men's/Co-ed** **Women** **Youth** **Family** **Refugees** **Respites**	List all sector(s) you would recommend for them			

OVERVIEW				
TOTAL SCORE	Total will be calculated automatically by the spreadsheet.			

Please return completed form to:		Hiring for the position of:	
Name			

To be filled in by the person completing the form

- Please fill in the information in the boxes above.
- In the **Has LE** column, please use an "X" to indicate whether the candidate identified themselves as having lived experience (LE) of homelessness or related experiences common among shelter residents (mental health or substance use challenges, refugee experiences, etc)

- Please use an "X" to indicate whether each candidate was shortlisted, interviewed, or offered a job; and whether they accepted the offer.
- If the candidate was NOT offered a job, please use the codes listed at the bottom of the following page to identify the reason(s) they were not selected, if that information is available to you, and in the "Comments - reason for hiring decision" column, briefly describe key reason(s) the candidate was not selected.

ID #	Candidate Name	Comments on reason not selected (If applicable)	Has LE		Shortlisted		Interview		Job Offer		Offer Accepted	
			Yes	No	Yes	No	Yes	No	Yes	No*	Yes	No
	SAMPLE Maya Lee	No experience working w/ people with mental health challenges		×	×		×			2, 4		

ID #	Candidate Name	Comments on reason not selected (If applicable)	Has LE		Shortlisted		Interview		Job Offer		Offer Accepted	
			Yes	No	Yes	No	Yes	No	Yes	No*	Yes	No

*Reason NOT Selected Codes: Please indicate all that apply:

1. Unable to contact candidate
2. Insufficient relevant work experience
3. Insufficient appropriate education or training
4. Insufficient skills or knowledge

5. Concerns about general job-readiness
6. Did not perform well during interview
7. Candidate references / pre-hire checks were unsatisfactory
8. Other (please provide details in Comments section)

Staff With Lived Experience Recruitment Initiative: Feedback to the Organizers and/or Human Resources Department (Optional)	
1. Overall, how satisfied were you with the candidates whose applications you received?	**Overall, how satisfied were you with the quality and suitability of the candidates with lived experience whose applications you received?**
[ ] Very satisfied [ ] Satisfied [ ] Somewhat dissatisfied, somewhat satisfied [ ] Dissatisfied [ ] Very dissatisfied	[ ] Very satisfied [ ] Satisfied [ ] Somewhat dissatisfied, somewhat satisfied [ ] Dissatisfied [ ] Very dissatisfied
Comments / Suggestions:	**Comments / Suggestions:**

Your responses are being collected by _____ to help us assess hiring outcomes for candidates who have self-identified as having lived experience of homelessness and other experiences common among shelter residents; this will inform our organization's efforts to help people with lived experience to successfully become employed in shelters. This form will may also inform our efforts to improve our overall processes for candidate evaluation and selection.

Information regarding outcomes for individual candidates will be kept confidential by _____**.** A summary of aggregate outcomes of our recruitment of staff with lived experience initiative may be shared with _____. Questions about this data collection can be directed to _____. This form is adapted from one designed by Toronto Employment and Social Services at the City of Toronto.

4.4 Tools from Other Sources: Recruitment and Hiring

These are tools created by other organizations/projects that are related to recruitment and hiring of people with lived experience. These tools are not designed specifically for the shelter sector, and they thus may not be designed to recruit for the same types of jobs that you are trying to fill. However, they focus on employing people with types of lived experiencethat are common among Toronto's shelter clients/residents, to work in organizations whose clientele/residents overlap with key populations that use shelter services in Toronto. They thus still provide relevant insights and can easily be adapted to Toronto shelters' needs.

This list provides the name of the organization, project or author that produced the tool, the year of publication, the pages where they appear in their original document, and (if available) links to the tool inside this PDF and/or URLs for the full original source document. I used the page numbering appearing on the pages of the document, where it existed; otherwise I used the PDF page numbers.

See the **A1** Annotated Bibliography: Resources for Further Learning and Practical Tools, p. 117 for more information about the sources of the tools.

Copies of many of these tools are provided in Appendix B of this toolkit; see **B1** List of Tools from Other Sources Included in Appendix B on p. 127.

Practical Tools: Job Postings

Tool B3.7 How to Write an Inclusive Job Posting, p. 165

Source: Hire for Talent (2017), section 4.3 (also see additional resources available at hirefortalent.ca)

Practical Tools: Evaluating and Selecting Candidates

Note: these tools were originally designed for evaluating candidates for positions in the mental health sector that are designated for people with lived experience.

Tool B3.1 Resume and Application Review Process, p. 153

Source: Working Well Together (2010), p.160

Tool B3.2 Sample Resume or Application Review Form, p. 154

Source: Working Well Together (2010), p.163

Tool B3.3 Resume or Application Review Sheet (for lived experience designated roles), p. 155

Source: Working Well Together (2010), pp.164-165

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health), p. 157

Source: Working Well Together (2010), pp.182-187

Tool B3.5 Applicant Selection Chart and Competency Profile, p. 163

Source: Working Well Together (2010), p.188

Tool B3.6 Candidate Selection Scoring Sheet, p. 164

Source: Working Well Together, p.189

Best Practices Guidance on Recruitment and Hiring of PWLE

Inclusive Recruitment (Best Practices Tip Sheet)

Source: WY-FI (2019), p.2

Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness), p. 144

Source: Change Toronto, p.8

5 Onboarding

5.1 Note to Readers:

This chapter is still in progress. We will be collaborating with Toronto shelters, people with lived experience, and other experts in 2022–2024, to produce recommendations specific to the shelter sector around onboarding of peer workers and other staff WLE.

For now, we recommend the following general resources on onboarding for peer workers and other positions designated for people with lived experiences, in the social services and health sectors. Many of the best practices and tools are applicable or adaptable to staff WLE in general shelter jobs, and are beneficial to other staff as well.

Copies of these tools are included in section B2 Copies of Tool from Other Sources. See **B1 List of Tools from Other Sources**, p 127 for a list of tools included in that section and the pages on which they can be found in this Toolkit.

5.2 Tools from Other Sources: Onboarding

This list provides the name of the organization, project or author that produced the tool, the year of publication, the pages where they appear in their original document, and (if available) links to the tool inside this PDF and/or URLs for the full original source document. I used the page numbering appearing on the pages of the document, where it existed; otherwise I used the PDF page numbers.

Copies of many of these tools are provided in Appendix B of this toolkit; see **B1 List of Tools from Other Sources Included in Appendix B** on p. 127.

Practical Tools

Tool B4.1 Components of an Orientation for Lived Experience Staff, p. 169

Source: Working Well Together (2010), pp. 205-207

Tool B4.3 Initial Orientation/ Training and Developing Individual Goal Plans with Peers, p. 174

Source: SSCH (2017), pp. 20-21
Includes a simple Peer Leader Personal Development Plan form for a supervisor to complete with a peer at the start of their employment.

Best Practices: Guidance from Other Sources

Tool B4.2 Tips for Developing Orientation Programs, p. 172

Source: Working Well Together (2010) pp. 208-209

Create a Positive Onboarding Experience

Source: DBHIDS (2017), p. 67

6 During Employment and Career Advancement

6.1 Introduction: During Employment and Career Advancement

Overview of Key Best Practices

By a wide margin, in both the management and frontline staff surveys, TSN found that the top priorities identified by staff WLE to support them during employment were, in the following order[1]:

1. Access to training and skills-upgrading
2. Having a supervisor who is supportive
3. A workplace that is welcoming and inclusive of PWLE
4. Access to workplace technology

In addition: mental health support was the next-most-commonly identified top priority in the survey - one of the top 3 for 16% of respondents[2]. It should be considered essential if employing people with LE of mental health challenges is a goal for your organization.

Given these priorities, this chapter outlines best practices for shelters around four key strategies/themes. (Note that creating a workplace that is welcoming and inclusive was already covered in Chapter 2, p. 29.)

1. **Strong and supportive supervision[3]:**
   To ensure staff WLE have the practical/administrative guidance and mentoring/support that they need. There are two different types of supervision that are highly valuable for staff WLE. These may be carried out by the same person or by different people, but ideally would occur at separate times to avoid ambiguity about the purpose of each meeting or communication.

   The precise division of which supervisory responsibilities are categorized under each type of supervisionwill be somewhat different for each organization or peer program:

   a. **Administrative supervision is focused on making sure the supervisee is meeting their job responsibilities**, and helping them to do so successfully, to accomplish the goals of the organization. Administrative supervisors are involved in performance evaluation, and are often responsible for making sure the staff member is completing administrative tasks, such as filling out timesheets. They may also provide some training and career-focused mentoring.

   b. **Supportive supervision is focused on helping the supervisee to have a positive experience at work, and supporting their personal growth and well-being.** This can include orienting them to the workplace culture, and helping integrate them into the staff team. Supportive supervisors provide frequent opportunities for advice and encouragement, and assist staff WLE in navigating personal challenges relevant to their work, including challenges arising on the job, and situations where their personal lives are impacting their success on the job.

   Supportive supervision is essential for peers and staff WLE who have high support needs. The supervisors for these staff should have specialized training in working with peers/PWLE, and ideally would not be the person responsible for administrative supervision.

   That said, it is valuable for all supervisors

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1   Survey participants were given a list of 12 potential supports, and asked to select their top 3 priorities. **Tool 6A Which Supports Do Toronto Shelter Staff WLE Find Most Helpful?**, p. 86.
2   Access to mental health supports was also one of the most common themes mentioned in TSN's survey of people with LE who were seeking shelter employment, when asked "What are three of the most important things that shelter operators can do to increase access to shelter jobs for people with lived experience... and to help these staff to have a positive experience at work?"

3   See Ablavsky, E. et al. (2009). *Building Blocks to Peer Program Success: A Toolkit for Developing HIV Peer Programs, Ch. 6 Supervising Peers*, pp. 57-59 for an excellent overview of the distinctions between administrative supervision, supportive supervision, and a third type, clinical supervision. https://ciswh.org/wp-content/uploads/2016/04/6._SupervisingPeersComplete.pdf.

to integrate supportive supervision practices when working with all supervisees, whether they have LE or not.

2. **Accommodations and flexible policies/ practices:** collaborating with staff WLE to make personalized adjustments to the job and working conditions to match their needs and capabilities, to enable them to succeed and have a positive experience at work.

    a. **Accommodations:** refers to modifications/supports that organizations are legally required to put in place to meet the needs of a staff member with a disability while not causing the employer undue hardship, as required by the employer's legal obligations under the Ontario Human Rights Code and/ or the Accessibility for Ontarians with Disabilities Act (AODA).[4]

    b. **Flexible policies/practices:** are similar to accommodations, but fall outside the organization's legal obligations, such as making adjustments for staff whose LE does not involve disability,

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4   In the context of employment, the Supreme Court of Canada has described the goals and purposes of accommodation as follows: "the goal of accommodation is to ensure that an employee who is able to work can do so. In practice, this means that the employer must accommodate the employee in a way that, while not causing the employer undue hardship, will ensure that the employee can work. The purpose of the duty to accommodate is to ensure that persons who are otherwise fit to work are not unfairly excluded where working conditions can be adjusted without undue hardship."

for example, refugees who need time off for appointments related to their immigration process.

3. **Access to specialized supports and benefits**, inside and outside your organization.

4. **Ongoing training and career advancement** for staff who are working in shelters whether in paid or unpaid roles. We include this with During Employment because supporting staff WLE to strengthen their skills and follow their desired long-term career paths ideally should be integrated throughout their time working at your shelter.

Many practices and policies that we identify as high priorities for ensuring the success of peer workers and staff WLE during their employment are valuable for all staff, particularly workplace policies and practices that help reduce burnout and aid with boundary-setting. Many types of specialized supervision practices, trainings, accommodations/flexibilities, and supports that are targeted for peer workers can be helpful to other staff WLE as well, and ideally some should be offered to all staff where possible.

Not all peers or staff WLE will need or want all of these supports and modifications,

and supervisors/HR should work with each staff member to determine what will work best for them. But they're especially important for staff who:

- are new to shelter work

- have been out of the workforce for a long time, or have significant employment-readiness challenges

Ideally, initial shelter work opportunities for these staff with higher support and/or training needs should be integrated into structured peer work or traineeship programs, where all necessary supports, intensive supervision, accommodations, flexibilties, training, and career advancement supports are built in in advance. In Toronto's shelter system at present (2022), this will usually necessitate partnering with external organizations, or getting funding to create internal special supervisory positions, to deliver aspects of the program that existing shelter staff do not have the time or skills to provide.

See **Chapter 7 Peer Work in Shelters and Other Positions Designated for PWLE**, p 91 for more information and tools for planning peer programs/ positions and other LE-designated roles.

Who Will Find This Chapter Relevant?

Primary target audiences include:

- Human resources (HR) departments at shelter-operating organizations

- Direct supervisors of staff WLE

- Staff from partner organizations or other departments within your organization who are (or are considering) partnering with your shelters around providing supervision, training, supports, and/ or career advancement assistance to volunteers/interns, trainees, peers, or other staff at your organization.

This chapter provides

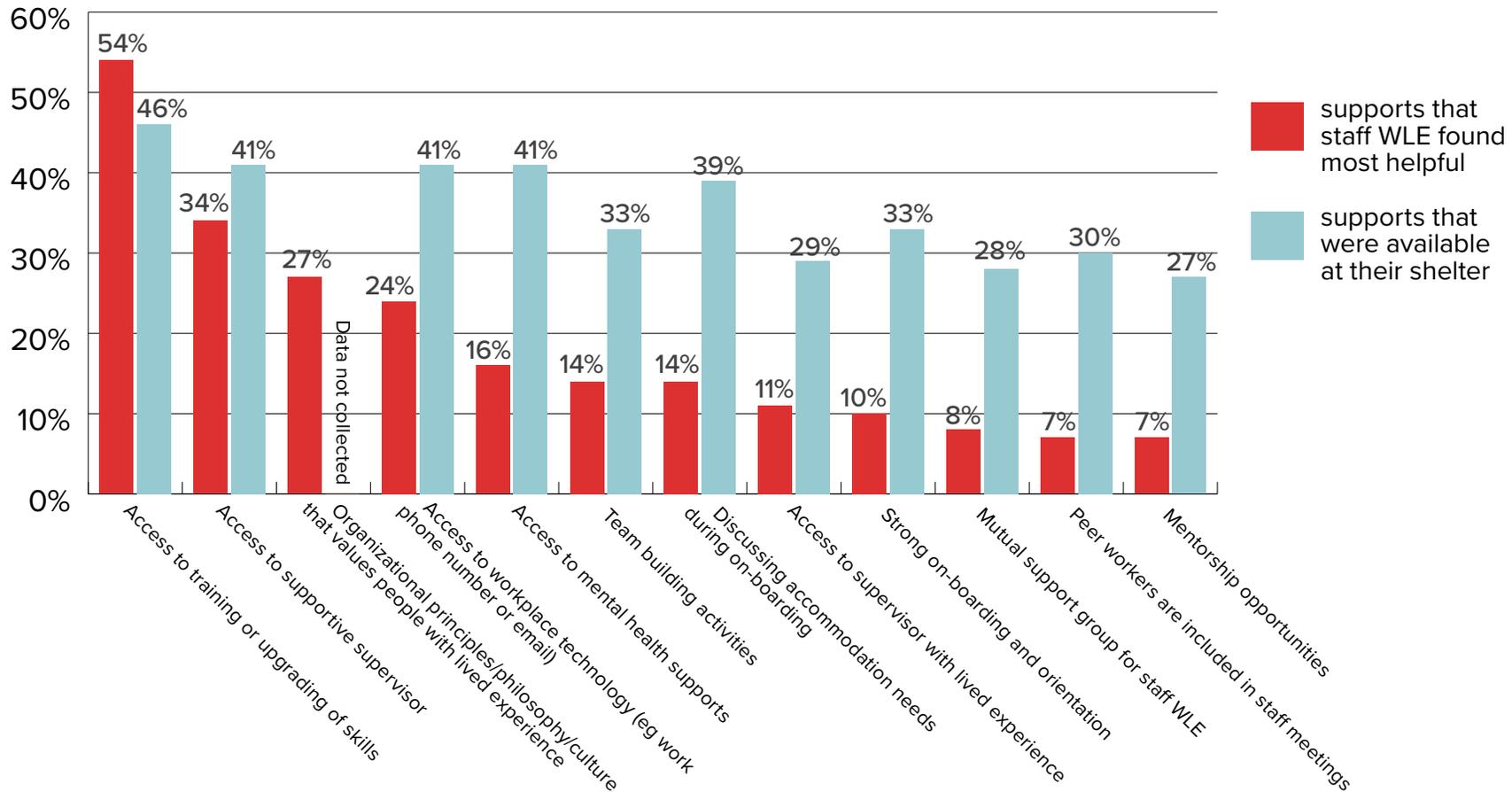1. Best Practices Tipsheets

2. Links to practical tools from other sources, for other sectors, locations, or target groups of PWLE, but which are easily used by shelters.

During Phase 2 of the Pipeline Project, shelter-specific practical tools on these topics may be co-designed with shelters, as needed.

6.2 Tools for During Employment: Supervision, Accommodations, Supports, and Career Advancement

Tool 6A Which Supports Do Toronto Shelter Staff WLE Find Most Helpful?

Legend:
- **supports that staff WLE found most helpful** (red)
- **supports that were available at their shelter** (light blue)

Support	Staff WLE found most helpful	Available at their shelter
Access to training or upgrading of skills	54%	46%
Access to supportive supervisor that values people with lived experience	34%	41%
Organizational principles/philosophy/culture	27%	Data not collected
Access to workplace technology (eg work phone number or email)	24%	41%
Access to mental health supports	16%	41%
Team building activities during on-boarding	14%	33%
Discussing accommodation needs	14%	39%
Access to supervisor with lived experience	11%	29%
Strong on-boarding and orientation	10%	33%
Mutual support group for staff WLE	8%	28%
Peer workers are included in staff meetings	7%	30%
Mentorship opportunities	7%	27%

Data source: *Survey of Frontline Shelter Staff* by Toronto Shelter Network, Jan.-Feb. 2021.

This question was from a supplemental section of the survey that was completed only by staff who identified themselves as PWLE. Staff were asked to identify the 3 supports they found the most helpful, out of a multiple choice list.

STRATEGY 1

Strong and Supportive Supervision

To ensure staff WLE have the practical/administrative guidance and mentoring/support that they need

Frequent informal check-ins, between formal supervision meetings

If the official supervisor won't regularly be on-site with the staff member, **recruit a co-worker "mentor" with a similar schedule**, for check-ins and advice.

Be sure staff member has **designated supervisor(s)**, and that everyone has **clarity about each supervisor's role**, and the schedule/frequency of supervision.

Supervisors of peers need special training and skills for supervising peers.*

Give PWLE the option of a supervisor with LE who can empathize, advise based on their experiences, and inspire hope about the possibility of success and career advancement.

Two types of supervision are needed - be sure everyone understands what each is for. Ideally, should be provided by separate supervisors, or at separate times.
1. **Administrative supervision:** for making sure the supervisee is meeting their job responsibilities, and helping them to do so successfully
2. **Supportive supervision:** for helping the supervisee to have a positive experience at work, and supporting their personal growth and well-being

Trauma-informed supervision skills/training needed for all supervisors organization-wide, since not all staff WLE self-identify.

Partner with an outside agency to provide specialized supervision (eg around healthcare, harm reduction), supports, and/or training to peers (and other staff WLE as needed) if the shelter management does not have the capacity, time, or specialized skills/knowledge to provide it.

STRATEGY 2

Accommodations and flexible policies/practices

Personalized adjustments to the job and working conditions to match each staff member's needs and capabilities

Be sure to meet your legal responsibility to provide **disability accommodations, including for mental health**; be sure all staff know this is available.

Recognize that **needs, challenges, and capacities of staff WLE vary greatly**, especially given the diverse types of LE that are relevant in the shelter sector. **Don't make assumptions.**

Work with each staff member WLE to determine which accommodations and other flexibilities would benefit them. Do this **during onboarding, and periodically afterwards**.

For staff who have been your clients/residents, offer the **option of working at a different site from where they stayed**.

Create and implement policies **that allow supervisors to modify work hours, job duties, etc.** to fit the needs of the individual, to the extent possible while still meeting needs of the shelter and its clients/residents.

Follow special best practices for staff who are working at a shelter where they currently or previously have stayed.

* For in-depth guidance on supervision of peers, explore some of the guides listed in A2 Full Toolkits/Guides from Other Organizations on Employment of PWLE, p. 124, including Building Blocks to Peer Program Success: A Toolkit for Developing HIV Peer Programs, and Supervising Peer Workers: A Toolkit for Implementing and Supporting Successful Peer Staff Roles in Mainstream Mental Health and Substance Use/Addiction Organizations.

Minor project: small changes to policies and practices

Mid-sized project: moderate changes to policies, practices or culture

Large project: major changes to policies, culture, or organization structure

STRATEGY 3

Provide access to specialized supports and benefits to meet priority needs of staff WLE

Vital to success for many staff WLE, but are beneficial for all staff

Opportunities to connect with other peers or staff with similar LE for mutual support – can be PWLE who work at another organization.

Access to free mental health supports offered by experienced providers from another department of your organization or a partner organization

Provide mental health supports through specialized staff position at your shelter (may be feasible if creating large internal PWLE employment program)

Targeted supports and resources for staff WLE to help avoid and address triggers and re-traumatisation related to their LE

STRATEGY 4

Ongoing training and career advancement

To enable peers and other staff WLE to do their jobs confidently and effectively, and to move into new types of roles that interest them. These practices would also benefit all staff.

Provide free core trainings shortly after hiring, such as Toronto Shelter Standards, First Aid/CPR, Non-violent Crisis Intervention, naloxone training, etc.

Training and skills-advancement through **non-academic learning opportunities** like mentoring and job-shadowing

Provide or pay **for ongoing training to foster a client-centred approach** that empowers shelter residents; **Peer support training** is great, especially for peer roles

Provide or pay for ongoing **training for current staff to maintain and increase skills and prepare for specialized or management roles**

Strengthen pathways from your peer programs and traineeships to jobs, and from general frontline jobs to specialized or management roles

Design performance evaluation processes geared toward building capacity and confidence

Supervisors AND/OR external support-providers should have **periodic discussions with staff WLE to explore long-term career goals and education/training goals**, and identify trainings, or degree/certificate programs that could meet PWLE's goals, and/or that the supervisor would like them to pursue to improve capabilities

METCALF FOUNDATION

**Employment Staff with Lived Experience:
A Toolkit for Shelter Management and Human Resources Staff**

Minor project: small changes to policies and practices

Mid-sized project: moderate changes to policies, practices or culture

Large project: major changes to policies, culture, or organization structure

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6.3 Tools from Other Sources: During Employment

The following are practical tools and best practices guidance related to supervision, accommodations, and other supports for employees with various types of lived experience that are common among Toronto's shelter clients/residents.

These tools are not designed specifically for the shelter sector, or for precisely the same types of jobs as those of the staff WLE that you are trying to support; but they do focus on employing staff with a variety of types of lived experience that are common among clients/residents of Toronto shelters. The tools thus can still provide relevant insights and can easily be adapted to Toronto shelters' needs.

This list provides the name of the organization, project or author that produced the tool, the year of publication, the pages where they appear in their original document, and (if available) links to the tool inside this PDF and/or URLs for the full original source document. I used the page numbering appearing on the pages of the document, where it existed; otherwise I used the PDF page numbers.

Copies of many of these tools are provided in Appendix B of this toolkit; see **B1** List of Tools from Other Sources Included in Appendix B on p. 127.

Supervision and Other Supports

Practical Tools

Tool B5.6 Social Service Trainee Evaluation, p. 194

Source: Fred Victor (2013), p. 57-62

- Could be adapted for any performance evaluation; particularly recommended for a relatively early-stage (~3-6 months evaluation) for a person in an LE-designated role, or who has self-identified as a PWLE with some employment barriers who would value some extra guidance/training to help them identify challenges and build their capacities

Best Practices: Further Guidance from Other Sources

Supervising Peers

Source: Ablavsky et al. (2009), pp. 56-110

- See Chapter 6 of Ablavsky et al. (2009), pp. 56-60 for an excellent summary, and the rest of the chapter for detailed advice and practical tools.

Tool B5.5 Successful Supervision Tools and Resources, p. 188

Source: Working Well Together (2010), p.214-216

Accommodations

Practical Tools

Tool B5.2 Accessing Necessary Accommodations, p. 181

Source: Working Well Together (2010), p. 45

- Lists questions for the employer to consider when planning accommodations
- For example: "What specific job tasks are problematic as a result of [the employee's] limitations?

Tool B5.3 Sample Accommodations, p. 182

Source: Working Well Together (2010), p. 46-49

- Lists frequently used workplace accommodations to address issues that often arise for PWLE of mental health challenges (which also arise for many other PWLE of homelessness), related to attendance, concentration, emotions, panic attacks, stress, etc.
- Sample accommodations include flexible work environment, flexible scheduling, modified breaks schedule, structure jobs to include only essential functions, allow employee to work one consistent schedule, etc

Tool B5.4 Questions to Ask About Accommodations and Supports, p. 186

Source: Working Well Together (2010), p. 50-51

- Questions for employers to ask the person with LE to encourage discussion and exploration of accommodation and support that might be necessary to help them be successful in their new role. Topics include: flexibility, physical space, supervision, emotional well-being, benefits, etc.

Best Practices: Further Guidance from Other Sources

Tool B5.7 Workplace Accommodation Essentials, p. 200

Source: Hire for Talent (2017), section 13.1

- Webpage

- PDF version

Tool B5.1 Accommodating Mental Illness in the Workplace, p. 177

Source: Hire for Talent (2017), section 12.5

- Webpage

- PDF version

7 Peer Work in Shelters and Other Positions Designated for PWLE

7.1 Introduction

About the Tools in This Chapter

Toronto Shelter Network consulted with peers, their frontline co-workers, shelter management staff, and peer support specialists to:

1. Learn about common challenges in Toronto's shelter system surrounding peer programs, peer worker positions, and other shelter work opportunities designated for PWLE;

2. Exchange ideas about best practices for addressing these challenges and strengthening the success of PWLE working in these positions

3. Understand the terminology that people currently use in Toronto to talk about social service work opportunities designated for people with lived experience, especially positions described as "peer" roles

The tools in this chapter share key learnings from these conversations, along with practical tools for planning and implementation.

Many excellent guides/toolkits for designing and implementing peer programs and other LE-designated employment opportunities have already been created for social services and health organizations; a number of these are listed in section **A2** Full Toolkits/Guides from Other Organizations on Employment of PWLE, p. 124. These contain comprehensive recommendations and tools covering all stages of the employment pathway for LE-designated positions. We strongly recommend that shelters starting such programs and positions rely on these guidebooks.

This chapter is intended as a supplement to these existing guides, to provide tools with a specialized focus on employment in shelters. The tools were designed based on needs, challenges, goals, and conditions that were identified by Toronto shelter sector staff and PWLE interested in shelter work.

The focus of each guide is a bit different in terms of;

- The sectors of employing organizations that are the target audience

- The types of lived experience of the PWLE

- What categories of jobs are covered (peer support only; all LE-designated positions; all types of jobs)

- Geographic location for which it was designed

However, each is either:

1. a general guide suitable for a broad range of non-profit sectors and/or for employment of people with diverse types of lived experience; or

2. focuses on sector(s) that overlap with the shelter sector, and focuses on employment of PWLE with type(s) of LE that are common among shelter residents

A Diversity of Definitions: How Toronto Shelter/Housing Organizations Currently Use the Term "Peer"

The ways that the terms "peer", "peer work", "peer worker", "peer support", and "peer supporter" are currently used in Toronto shelters and related sectors are quite variable. The definitions we use in this project (see 7.2 Glossary, p. 99) are a compromise based on consultations with stakeholders. But in practice the range of positions that are described as "peer" roles or programs is quite broad, the Pipeline Project's advisors did not reach a full consensus. Different organizations and individuals in Toronto continue to use conflicting definitions.

Our research revealed that shelter and supportive housing positions in Toronto (including both paid and unpaid roles) are sometimes called "peer work" if one or more of the following are true:

The position is designated for one or more of the following groups.

People who:

- Live at the site; or

- Have lived/stayed there recently; or

- Have recently experienced relevant LE; or

- Have recently used shelter/homelessness services; or

- Have had relevant LE or used shelter/homelessness services at some point in their lives

The responsibilities of the positions require:

- Drawing on past or present lived experience; or

- Providing direct support to people with lived experience similar to your own; or

- Disclosing LE to clients and/or colleagues

The position is:

- A work opportunity where the primary purpose is to facilitate the peer's learning, personal growth, and/or recovery; income generation is secondary; or

- A supported work opportunity that is feasible for people who have been out of the labour market for a long time and face employment barriers

- A job that is designated for PWLE, but which is similar to other frontline jobs in terms of the level of responsibility, independence, and/or skills required

Tool 7A Peer Work in Toronto Shelters: Common Challenges and Solutions

(p. 1/4)

This tool identifies issues around peer work that are particularly common and significant in shelters in Toronto, and some best practices that peers and their supervisors have identified as valuable for addressing these challenges. We are flagging these as specific to shelter peer work because:

1. **They are issues specific to shelters** that are less likely to arise in other sectors that have historically incorporated peer work, such as supportive housing, community health, harm reduction, mental health centres, and hospitals; AND/OR

2. **They are issues of particularly strong importance for peer workers**, but are less likely to arise for staff with lived experience working in general jobs in Toronto's shelter system.

They are often also relevant for PWLE working in other types of LE-designated traineeships or work placements, particularly roles designed for people with significant support needs).

For more ideas around supervision for peers working in shelters, see **Tool 6B** During Employment Best Practices #1: Supervision, Accommodations, and Flexibility, p. 87, and **Section 6.3** Tools from Other Sources: During Employment, p. 89.

Challenges Around Supervision in the Shelter Context	
Challenges	**Solutions**
Shelter staff are stretched thin, and have minimal time and energy to provide support and supervision	Create a peer program where shelter peer workers have a supportive supervisor from a partner organization, or specialized in-house staff member who has supervising and supporting peers as a primary part of their role. This should ideally be in addition to having an on-site supervisor at the shelter site.
Shelter supervisors are often not knowledgeable about peer work because it has been very rare in shelters	Prioritize hiring/promoting people with peer work expertise into shelter supervisor positions
Due to the 24-7 nature of shelters, many shelter staff do not have regular contact with their supervisors on-site, or regularly-occurring formal supervision sessions. This lack of regular contact with supervisors can be challenging for peers, who often need more significant support, particularly earlier in their time on the job.	Have a supportive supervisor available for as-needed phone/email/Zoom check-ins, particularly for emotionally or personally challenging situations that arise.

Challenges Arising from Shelter Residents' Life Situations	
Challenges	**Solutions**
Many shelter residents are at a time of major crisis in their lives. While some feel ready to work, for others, it's not the time in their lives that they will feel most ready to work, even if they are interested in shelter peer work in theory. **In addition, engaging directly with other people in crisis may be too triggering.**	Offer the option of a peer program/position geared towards PWLE who are already housed and whose lives are more stable, while still not being so distant from the lived experience that clients no longer experience them as "peers", or they are less able to empathize. Train frontline shelter workers and/or case managers to identify shelter residents interested in this work, and coordinate with housing follow-up workers who can help connect the person to the peer program once their life situation and housing have stabilized.

Employment-readiness, interests, skills, and employment barriers of shelter residents vary significantly.
 	
Also, many shelter residents are relying on benefits that they can't afford to lose, which could happen if their earnings get too high. This limits the number of hours they are able to work.
	1. Have a wide range of peer employment options, including some that have:
	  » Flexible and/or small number of hours
	  » Low barriers to entry / low training needs
	  » Significant supports
	2. Before designing peer positions and programs, survey residents of your shelters to understand their current employment goals, interests, skills, and needs (around support, training, etc). This should include:
	  » Surveying a broad sample of clients/residents interested in shelter work or peer work, to inform design of the program (see **Tool 7E** <u>Peer Work: Client Survey</u>, p. 112 as an example)
	  » Conducting a goal-setting and/or interview process with each individual to connect them to appropriate roles[1]

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1   A tool for this is planned for the Pipeline Project Phase 2 *Toolkit for PWLE Interested in Shelter Work and the Staff Who Support Them.*

Challenges and Opportunities: Expanding the Shelter Sector's Understanding of the Possibilities for Peer Work within the Shelter Sector	
Challenges	**Solutions**
There is sometimes hesitation about peer work among management and other staff; some stakeholders report that peer work has a negative reputation in Toronto's shelter system due to a small number of past programs that were unsuccessful. A number of stakeholders that we consulted noted that these programs may not have had sufficient supports to enable the peers to succeed, and they believe success is fully possible in the future by following best practices; but it can be difficult to overcome the negative stereotypes from the past.	Prior to peers starting, 1. Ensure that peers have proper training[1] 2. Follow onboarding best practices.[2] 3. Provide training to their direct supervisors and co-workers (and ideally the full staff team) to help them understand the principles, benefits, and best practices around peer work; reduce stigma around lived experience, and foster a culture where peer workers are treated as full-fledged co-workers. (See **Tool 3B** <u>Sample Curriculum Training for Shelters on Understanding Peer Support</u>, p. 42)
Peer work in shelters is currently focused almost exclusively on **harm reduction, but harm reduction roles are not a good fit for everyone, resulting in limited opportunities for two distinct groups of PWLE, who together represent a large fraction of shelter residents.** 1. **People who do not have LE of substance use** challenges are often not eligible for these roles. 2. However, many harm reduction positions can **also be unsuitable/undesirable for some people in recovery** from substance use. Engaging directly with harm reduction supplies or people in substance-related crisis can be too emotionally triggering, or create risk of relapse for people who are practicing abstinence.	Develop peer work programs and positions that draw on the full range of expertise that people can bring to the table based on other types of lived experience unrelated to substance use, including homelessness, mental health challenges, staying in shelters, navigating social service systems, refugee experiences, and more. Examples of types of successful peer positions that exist in other sectors that would be extremely valuable to meet needs of shelter residents include: ■ Peer support worker - generalist: provides emotional and social support to others who share a common experience. ■ Peer navigator - helping clients/residents to access services that you have experience accessing ■ Peer counsellor ■ Peer educator/facilitator or group leader ■ Peer researcher ■ Peer outreach worker (to people living on the street) ■ Peer housing follow-up support worker (see the third page of **Tool 7E** <u>Peer Work: Client Survey</u>, p. 112 of this toolkit for descriptions of different types of peer roles)

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1 See Annotated Bibliography for peer work guides and toolkits that include recommendations around peer support and peer work training. Specialized best practices for peers work in the shelter sector will be addressed in the planned Pipeline Project Phase 2 Toolkit for PWLE Interested in Shelter Work and the Staff Who Support Them.

2 For ideas, see: Working Well Together (2010), "Developing Position and Program Orientation", pp. 200-207. Includes a tool on pp. 205-207 called "Components of an Orientation for Lived Experience Staff" to use to help plan your onboarding/orientation process.

Challenges and Opportunities: Expanding the Shelter Sector's Understanding of the Possibilities for Peer Work within the Shelter Sector	
Challenges	**Solutions**
Some "harm reduction peer" roles, such as needle clean-up or kit-making, would not be considered "peer" positions under most definitions we have encountered (including the definitions of "peer work" that we chose to use in this toolkit), because these roles do not require drawing on their lived experience to do the work.	Avoid including the term "peer" in the job titles or descriptions of harm reduction roles that do not involve direct engagement with clients, so that: ■ People with interest in and skills/training in peer support don't misunderstand the nature of the role and apply for a position that doesn't take advantage of their abilities or match their interests ■ People who want to do hands-on tasks can identify the position as one of interest to them
There is a wide range of other supports that shelter clients desperately need that PWLE/peers are uniquely well-positioned to provide; but these needs are going unmet due to the limited focus on harm reduction.	Create peer programs and positions in other areas that shelter staff and clients have identified as priorities for peer support, and where peer support has proven successful in other contexts, including: ■ Mental health supports ■ Counselling/mentoring ■ Preparing for transition into housing ■ Pre-employment supports ■ Health promotion and education ■ Running group social/recreational activities Survey client/residents to find out what types of supports and services from peers would be most valuable to them.

Tool 7B Best Practices: Equality and Fairness When Employing Peer Workers

Also applies when employing people in traineeships and other positions designated for PWLE

THESE PRACTICES HELP TO ENSURE

- Peers are given the rights, respect, and resources offered to other staff in similar roles; but also
- Peers' unique roles/responsibilities are understood and honored, and their unique needs are met

Make sure all supervisors and co-workers understand the peer worker's role/responsibilities as outlined in their job description, so they are given tasks that:

- They are ready for
- Match what they were hired to do
- draw on their unique expertise

(Job description must also be well-designed to ensure this)

Provide financial and legal orientation to peers about:

- Impacts of income on government benefits
- How income will be taxed
- When/how to report earnings to CRA, ODSP, OW, etc.
- The terms of their contracts
- Differences in rights, responsibilities, taxation, and reporting requirements for volunteers with honorarium; independent contractors; and employees

Always have at least two peer workers on site on a shift

Give peers access to the technology they need to function effectively at work, and feel like equal respected team members, such as:

- email address
- access to computers, printers, and phones
- keys for long-term peer staff

Pay equal to non-peer staff with similar duties or level of responsibility

Follow best-practices guidelines for peer pay rates*

*For recommendations on peer payment standards, which were developed in collaboration with peers and service providers, see Becu, A. & Allan, L. (2017). *Peer Payment Standards for Short-Term Engagement*. Vancouver, BC: BC Centre for Disease Control. towardtheheart.com/assets/uploads/15179375313w2NlPIxDMKkCpBVYkUG-dk2H5yehW0ckIhda0m4.pdf

7.3 Glossary

Formal Peer Support Peer support that is offered by trained and/or experienced peer support workers within a structured setting.

General shelter jobs Jobs at shelters that may be held by people with or without lived experience.

Honorarium Small thank you payment to a volunteer.

Informal Peer Support Less structured support provided by people with similar lived experience who are drawn together by what they have in common, with none more experienced or better prepared to offer support than the other.

Lived Experience (LE) In the shelter sector, this means having experienced homelessness or other experiences common among shelter residents/clients.

People with Lived Experience (PWLE) People who have stayed in a shelter or experienced homelessness of any kind and/or had other types of life experience that are common among people experiencing homelessness.

Peer Program Programs that combine peer work opportunities, work-related training, support services, recovery support groups with other peers, etc. In the shelter sector, the work-related training would ideally include, at minimum, training in general employment skills, peer support, and specialized shelter work skills.

Peer Support Providing emotional, social, or practical support to people with lived experience similar to one's own.

Peer Volunteers People in unpaid roles that involve similar types of responsibilities to peer work; and/or providing informal peer support.

Peer Work Paid roles for PWLE that require drawing on lived experience.

Roles Designated for PWLE or **LE-designated roles or positions** Paid or unpaid roles that are exclusively for PWLE. These roles may or may not require drawing on their lived experience, but the positions have been designed to have different responsibilities and required qualifications from the organization's "general shelter jobs" which are open to people with or without LE.*

Shelter Any of the following: 24-hour emergency homeless shelters, respite centres, 24-hour drop-ins, transitional shelters, and COVID response hotels/programs.

Staff with Lived Experience (Staff WLE) PWLE who do any type of paid work at a shelter or for a shelter.

Stipend Payment to help cover living expenses while you complete a traineeship or placement.

*Note: certain authors and organizations use very similar terms but give them a somewhat different meaning. For example, in QMHC *Full Report* (2019), the authors use the terms "lived experience roles", "lived experience workforce" and "lived experience designated" jobs to refer exclusively to formal positions that fall within this Toolkit's definition of "peer support".

Spectrum of Shelter Work/Volunteer Roles Designated for PWLE: A Basic Overview

Roles require <u>drawing on</u>

| Lived Experience Advisory Committees | Peer Program with Casual Work Opportunities | Peer Program with Formal Work Placement | Peer Work Jobs – non-supervisory | Peer Lead or Peer Supervisor job |

Some roles require drawing on LE and some do not

| Volunteer Opportunities for PWLE in Shelters (usually for residents, at site where they stay) | Occasional Paid Opportunities with Gift or Honorarium |

Roles require <u>having LE</u>

Drawing on LE is not expected but is an asset

| Work Placement or Employment-Readiness Programs for PWLE* | Social Service Traineeships | Frontline Jobs Designated for PWLE with modified job description, but not required to draw on LE | General Shelter Jobs (all kinds) set aside for PWLE |

Occasional work or volunteer hours → **Training and development positions/ programs (paid or unpaid)** → **Shelter jobs**

TEND TO INVOLVE*: ■ Fewer hours and shorter time period ■ More flexibility ■ More focus on opportunities, learning, and recovery for PWLE ■ Less training and/or work experience needed ■ Lower compensation - thank-you gift, stipend, or unpaid

TEND TO INVOLVE*: ■ More hours, longer time period ■ Greater commitment required ■ More focus on meeting shelter's staffing needs ■ More training or work experience needed ■ Higher compensation - waged or salaried, above minimum wage ■ More employee-like relationship to organization – should have contract

*Every position is different and has a different combination of these features. These tendencies thus do not apply precisely to every work/volunteer position in any given category. For example, sometimes lived experience advisory committee participants are paid above the Toronto living wage, even though the role involves very few hours in total.
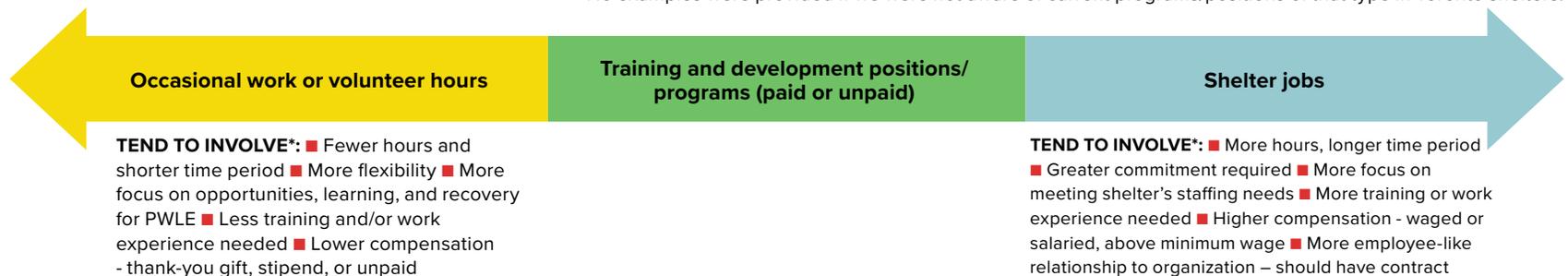
Roles in shelters, drop-ins, homelessness services, and supportive housing

(Some programs involve work opportunities in other types of social services and housing sectors as well.)

Roles require <u>drawing on</u>

Lived Experience Advisory Committees
» Shelter Support and Housing Administration (SSHA): Harm Reduction Advisory Group

Peer Program with Casual Work Opportunities
» Toronto Shelter Network, with Multiple Shelters: Peer Health Ambassadors
» Homes First: Harm Reduction in Shelters Program

Peer Program with Formal Work Placement
» Toronto Neighbourhood Group (TNG), with Multiple Shelters: Integrated Prevention and Harm Reduction Initiative (iPHARE)
» Parkdale Activity-Recreation Centre (PARC), with Multiple Shelters: Peer Shelter Support Program

Peer Work Jobs: Non-Supervisory
» Fred Victor: 24-Hour Women's Drop-in Peer Workers

Peer Lead or Peer Supervisor Jobs
» Toronto Shelter Network: Peer Champion Team Lead

Some roles require drawing on LE and some do not

Volunteer Opportunities in Shelters for PWLE (usually at the site where they stay)
» Covenant House: Peer Education and Connection Through Empowerment (P.E.A.C.E. Project)

Occasional Paid Opportunities for PWLE with Gift Card or Honorarium
» Dixon Hall: client participation in surveys

Roles require <u>having LE</u>

Drawing on LE is not expected but is an asset

Work Experience or Employment Readiness Programs for PWLE

Social Service Traineeships
» Fred Victor: Social Service Training and Employment Program (SSTEP)

General Shelter Jobs (all kinds) Designated for PWLE, with modified job description

General Shelter Jobs (all kinds) set aside for PWLE, with same job description as staff without LE

No examples were provided if we were not aware of current programs/positions of that type in Toronto shelters.

← **Occasional work or volunteer hours** | **Training and development positions/ programs (paid or unpaid)** | **Shelter jobs** →

TEND TO INVOLVE*: ■ Fewer hours and shorter time period ■ More flexibility ■ More focus on opportunities, learning, and recovery for PWLE ■ Less training and/or work experience needed ■ Lower compensation - thank-you gift, stipend, or unpaid

TEND TO INVOLVE*: ■ More hours, longer time period ■ Greater commitment required ■ More focus on meeting shelter's staffing needs ■ More training or work experience needed ■ Higher compensation - waged or salaried, above minimum wage ■ More employee-like relationship to organization — should have contract

7.6 Practical Tools for Planning a Peer Program/Position or Traineeship Program

Participating Organizations

	Organization Name	Organization Role (brief description)
Lead Organization		
Participating Shelter Organizations and Sites		

About the Program

Primary Purpose(s) of Program	Choose one or two of the following: [ ] Support the peer's learning, recovery, and/or life stabilization [ ] Work experience, on-the-job training, and employment readiness for peer [ ] Income / job for PWLE [ ] Meeting a staffing need at shelter / Adding new types of staff roles at a shelter [ ] Other _____
Program Description	

About the Position(s)

Position 1 Title	
Main Responsibilities	
Who is eligible for the position?	Relationship to shelter where they work: [ ] Current resident [ ] Past resident of the shelter organization where they work [ ] Current resident of another shelter run by same organization [ ] Past resident of another shelter organization [ ] Current resident of another shelter organization [ ] Never stayed in a shelter
Types of LE	
Other key eligibility	
Type of compensation	[ ] Volunteer [ ] Hourly wages [ ] Stipend/honorarium (below minimum wage [ ] Salary and benefits pay, for traineeship or work placement) [ ] Other (describe)
Pay level (if publicly available)	[ ] Below minimum wage [ ] Minimum wage [ ] Toronto living wage [ ] Above minimum wage, below Toronto living wage [ ] Above Toronto living wage
Employment Status	[ ] No contract or formal relationship [ ] Contracted employee [ ] Independent contractor [ ] Permanent employee [ ] Casual employee [ ] Other (specify)
Hours	Choose from the following, then provide more specifics below if you wish. [ ] One-time [ ] Part-time [ ] Casual/occasional [ ] Full-time
Number of hours (optional)	
Length of contract	

About the Position(s)

Position 2 Title	
Main Responsibilities	
Who is eligible for the position?	Relationship to shelter where they work: [ ] Current resident [ ] Past resident of the shelter organization where they work [ ] Current resident of another shelter run by same organization [ ] Past resident of another shelter organization [ ] Current resident of another shelter organization [ ] Never stayed in a shelter
Types of LE	
Other key eligibility	
Type of compensation	[ ] Volunteer [ ] Hourly wages [ ] Stipend/honorarium (below minimum wage [ ] Salary and benefits pay, for traineeship or work placement) [ ] Other (describe)
Pay level (if publicly available)	[ ] Below minimum wage [ ] Minimum wage [ ] Toronto living wage [ ] Above minimum wage, below Toronto living wage [ ] Above Toronto living wage
Employment Status	[ ] No contract or formal relationship [ ] Contracted employee [ ] Independent contractor [ ] Permanent employee [ ] Casual employee [ ] Other (specify)
Hours	Choose from the following, then provide more specifics below if you wish. [ ] One-time [ ] Part-time [ ] Casual/occasional [ ] Full-time
Number of hours (optional)	
Length of contract	

METCALF FOUNDATION

About the Position(s)

Position 3 Title	
Main Responsibilities	
Who is eligible for the position?	Relationship to shelter where they work: [ ] Current resident [ ] Past resident of the shelter organization where they work [ ] Current resident of another shelter run by same organization [ ] Past resident of another shelter organization [ ] Current resident of another shelter organization [ ] Never stayed in a shelter
Types of LE	
Other key eligibility	
Type of compensation	[ ] Volunteer [ ] Hourly wages [ ] Stipend/honorarium (below minimum wage [ ] Salary and benefits pay, for traineeship or work placement) [ ] Other (describe)
Pay level (if publicly available)	[ ] Below minimum wage [ ] Minimum wage [ ] Toronto living wage [ ] Above minimum wage, below Toronto living wage [ ] Above Toronto living wage
Employment Status	[ ] No contract or formal relationship [ ] Contracted employee [ ] Independent contractor [ ] Permanent employee [ ] Casual employee [ ] Other (specify)
Hours	Choose from the following, then provide more specifics below if you wish. [ ] One-time [ ] Part-time [ ] Casual/occasional [ ] Full-time
Number of hours (optional)	
Length of contract	

About the Position(s)

	Type of support	Organization providing this	Brief Description of the support or training
Before employment or placement	Pre-employment supports during recruitment and hiring process for the peer positions		
	Preparing the organization (to successfully host a peer or trainee)		
	Training for participant (for the position)		
	Onboarding		
During Employment / Placement	Supportive Supervision		
	Administrative Supervision (including payment and other human resources responsibilities)		
	Accommodations and flexibilities		
	Other supports/benefits		
Career Advancement	Training (for career advancement)		
	Pre-employment supports for next steps		

How to use this tool:

1. **Program planning tool:** when planning a peer program that involves multiple organizations or departments, the planning team can use this tool to figure out who will be responsible for what, and make sure everything is covered

2. **Info sheet for organizations involved in an active peer program:** Provide filled-in copy of the tool to everyone (supervisors, shelter site managers, partner organizations providing supervision/training/etc) so everyone understands each others' roles and knows whom to contact about what. When using for this purpose, include contact information for anyone that the person receiving the sheet will need to be able to reach.

	Organization	Primary Role
Lead Organization		

Stage of Pathway	Role / Task	Organization(s)	Point Person(s)	Notes
Strategic Planning and Preparing the Shelter Organization	Designing the peer program			
	Designing the peer jobs/positions			
	Training for supervisors			
	Preparing the rest of the shelter staff team: understanding peer work, combating stigma, etc.			
	Liability insurance			
Pre-Employment and Training	Peer support training			
	Shelter work training			
	Pre-employment supports (to help people through hiring process)			

Stage of Pathway	Role / Task	Organization(s)	Point Person(s)	Notes
Recruitment and Hiring	Job post creation			
	Promoting/advertising the posting			
	Recruitment outreach - internal (to clients/residents of the employing shelters and the project partner organizations)			
	Recruitment outreach - external			
Onboarding	Administrative onboarding			
	Orientation to your organization - culture, values, policies, etc			
	Training for the role			
During Employment: Supervision[1]	Administrative supervision (and human resources – eg payroll)			
	Supportive supervision			
	Technical supervision (eg, for healthcare tasks)			

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1   **Administrative supervision is focused on making sure the supervisee is meeting their job responsibilities**, and helping them to do so successfully. Common roles/duties for the supervisor include performance evaluation and making sure the staff member is completing administrative tasks, such as filling out timesheets. They may also provide some training and career-focused mentoring.

Supportive supervision is focused on helping the supervisee to have a positive experience at work, and supporting their personal growth and well-being. This can include integrating them into the workplace culture and team; providing frequent check-ins for advice and encouragement, and assisting staff WLE in navigating personal challenges related to their work.

Stage of Pathway	Role / Task	Organization(s)	Point Person(s)	Notes
During Employment: Supports	Coordinating/hosting mutual support among peers or trainees			
	Mental health services and personal support			
Ongoing Training and Career Advancement	Ongoing training to improve skills during the program			
	Supports for planning next stage of journey (employment, education, volunteering, deciding to continue in current role, etc): goal-setting, job search skills, accessing training, etc.)			
Other				

These ideally would be provided by different people. The precise division of which supervisory responsibilities are categorized under each type of supervision will be different for each peer program.

Tool 7G Peer Work: Client Survey

(p. 1/4)

We are seeking input from Dixon Hall clients to inform us on the development of a Peer Work Program. **We are NOT offering employment opportunities or peer programs at this time.**

In order to customize programs to your experience and needs, we would love to hear about your interests, skills and ideas. Your participation in this survey is voluntary and all information collected will be confidential and will only be seen by people who work for Dixon Hall or Toronto Shelter Network.

The survey should take about 10-20 minutes and you will receive a $5 gift card upon survey completion.

This survey was designed for clients/residents at Dixon Hall. Other organizations can adapt the document by using a PDF editor to make minor wording changes, or can use the content to inform development of your own survey.

A. About you

Age	Pronouns	Gender

Do you have government issued picture ID?

[ ] Yes   [ ] No

Do you have a bank account?

[ ] Yes   [ ] No

Do you consider yourself to be someone who has lived experience with the following: Check all that apply

[ ] Mental Health Challenges   [ ] Consumer / Survivor

[ ] Substance Use Challenges   [ ] Lived experience of trauma

[ ] Sex Work   [ ] Homeless more than once

[ ] Refugee   [ ] Victim of racial profiling

[ ] Incarceration

People often describe themselves by their race or racial background. For example, some people consider themselves "Black", "White" or "Asian". Please specify your ethnicity or race. Check the applicable category or categories, and/or fill in your own response at the bottom.

[ ] Aboriginal or Indigenous (eg. First Nations, Metis, Inuit)

[ ] Arab or Middle Eastern

[ ] Asian

[ ] Black

[ ] Hispanic. Latino, Latina, Latinx, or Latin American

[ ] White (e.g. European)

[ ] Mixed race

[ ] Don't know

[ ] Prefer not to answer

[ ] Not listed, or I would like to provide more detail (please specify):

_____

_____

B. Employment and Education History, and Goals

How long ago were you last employed?

[ ] Less than 2 years ago

[ ] 2-5 years ago

[ ] 5+ years

Looking at this list of skills, which ones do you have? Which ones would you like to use in your future employment? Check all that apply.

I have this skill	I would like to use this skill in my future employment			
[ ]	[ ] General Labour	[ ]	[ ] Landscaping/Gardening
[ ]	[ ] Harm Reduction	[ ]	[ ] Administrative
[ ]	[ ] Construction	[ ]	[ ] Sewing
[ ]	[ ] Customer Service	[ ]	[ ] Social Services
[ ]	[ ] Cleaning	[ ]	[ ] Research
[ ]	[ ] Food Service	[ ]	[ ] Repairs
[ ]	[ ] Delivery Service	[ ]	[ ] Health & Wellness

What other work are you skilled at that you would like to use in your future employment?

_____

_____

_____

What other skills would you like to learn?

_____

_____

_____

What type of education do you have? Check all that apply.

[ ] Primary school

[ ] Secondary school

[ ] University undergraduate degree

[ ] College diploma or certificate

[ ] University graduate degree

[ ] Some post-secondary coursework, but no degree, diploma, or certificate completed

[ ] Formal training in peer support or peer work

If you completed any university or college courses or degree/diploma/certificate programs, please specify the field:

_____

Do you have any other special trainings or certificates?

[ ] Yes   [ ] No

If yes, please specify:

_____

_____

_____

_____

Have you ever worked or volunteered as a Peer? Check all that apply.

[ ] Yes - paid work

[ ] Yes - volunteered

[ ] No

If yes:
Name of Organization _____

_____

Your title _____

_____

Have you ever worked or volunteered at a shelter or another organization that supports/engages/houses people with experiences of homelessness or other experiences common among shelter residents? Check all that apply.

[ ] Yes - paid work   [ ] Yes - volunteered   [ ] No

If yes:
Name of Organization _____

Your title _____

C. Peer Work Definitions and Interests

Are you familiar with the term "peer work"?

[ ] Yes   [ ] No   [ ] Not sure

What do you think "peer work" means? (You can answer even if you have never heard it before, or if you are not sure what it means)

_____

_____

_____

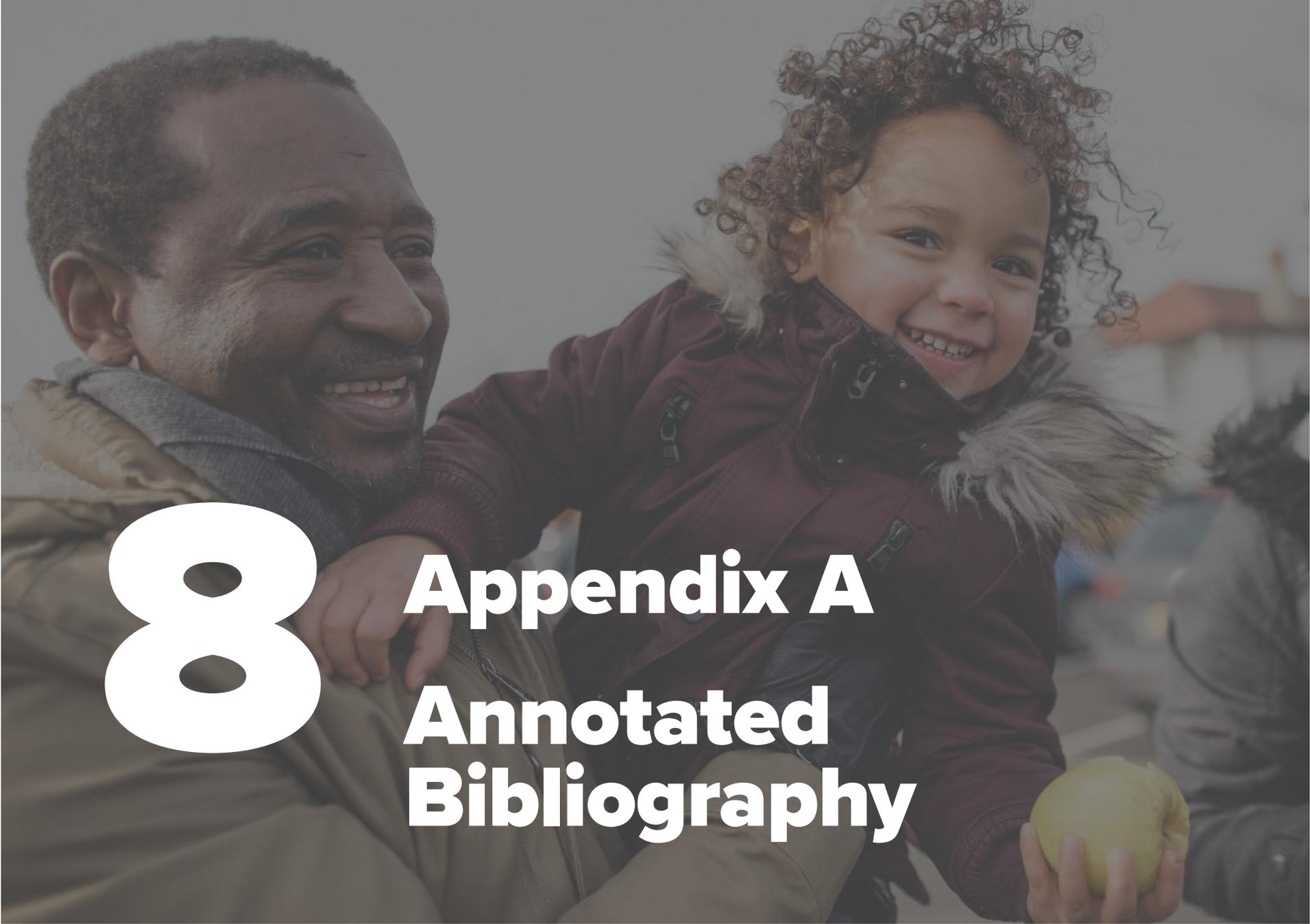**What type of peer roles would you be interested in?** Check all that apply.

[ ] **Peer Support Work (general):** provides emotional and social support to others who share a common experience, such as homelessness, mental health challenges, or substance use. Could involve listening, building trusting relationships, role-modeling behaviors, help with goal-setting, connecting clients/residents to resources, group peer support, etc.

[ ] **Harm Reduction Peer Worker:** Harm-reduction supports (OD prevention, needle clean up, kit-making, outreach to people involved in substance use)

[ ] **Peer Food Service Worker:** Assist in Food Programs (client/resident engagement at mealtimes, food prep, set up and clean up)

[ ] **Peer Navigator:** Connects people to resources in community (eg drop-in/health care services)

[ ] **Peer Outreach Worker:** Engaging with people experiencing street homelessness. May include providing clean supplies, connecting them to services (including shelters) providing water, snacks, or other basic needs.

[ ] **Peer Educator/Facilitator:** Developing education resources, group facilitation, training

[ ] **Peer Researcher:** Preparing and administering surveys, may participate in analysis and evaluation

[ ] **Peer Lead:** Supervising and supporting other peer workers, coordinating peer programs

[ ] **Advisory Roles for Peers:** advising organizations or projects, to contribute to strategic planning, program design, policies, and/or hiring decisions. Could involve participating in advisory groups, Boards of Directors, or focus groups.

[ ] **Other** (please describe)

_____

_____

_____

D. Current Needs and Preferences

What hours would be best for you? Check all that apply.	What time of day would be best for you?	How long would you like your employment to be?	If options are available, how would you like to be paid?
[ ] Casual (less than 10 hrs/wk)	[ ] Morning (until 12pm)	[ ] Seasonal (1-2 months)	[ ] Cash
[ ] Part-time (10-20 hrs/wk)	[ ] Midday (12-6pm)	[ ] Short-term (3-6 months)	[ ] Cheque
[ ] Full-time (31-40 hrs/wk)	[ ] Evening (6-10pm)	[ ] Long-term (6 months +)	[ ] Gift Card
[ ] Part-time with more hours (21-30 hours/wk)	[ ] Overnight		[ ] Direct Deposit

How comfortable are you with electronic communications? Check all that apply.

	Very comfortable	Somewhat comfortable	Not at all comfortable	I would like to receive training to learn more	
Using a smartphone	[ ]	[ ]	[ ]	[ ]	Other:
Texting	[ ]	[ ]	[ ]	[ ]	_____
Email	[ ]	[ ]	[ ]	[ ]	_____
Surfing the internet	[ ]	[ ]	[ ]	[ ]	_____
Social Media	[ ]	[ ]	[ ]	[ ]	_____
Microsoft applications	[ ]	[ ]	[ ]	[ ]	_____

E. Next Steps

Are you interested in attending an information session and discussion about developing a new Peer Work Program at Dixon Hall?

[ ] Yes   [ ] No   [ ] Maybe

If yes, please add your name and contact information. If you prefer to keep your survey responses anonymous, please let the survey administrator know, and you can provide your name and contact information on a separate sign-up sheet.

Name _____

Phone number _____

Email _____

If we were to create peer work opportunities at other Dixon Hall sites or programs, which ones would interest you?

	Very interested	Somewhat interested	Not at all interested
Housing Department	[ ]	[ ]	[ ]
Seniors Department	[ ]	[ ]	[ ]
Settlement Services	[ ]	[ ]	[ ]
Children & Youth	[ ]	[ ]	[ ]
Employment Resource Centre	[ ]	[ ]	[ ]
Human Resources	[ ]	[ ]	[ ]

If you are interested in peer work at shelters, where would be interested to work?

	Very interested	Somewhat interested	Not at all interested
The shelter site where I am staying	[ ]	[ ]	[ ]
Other Dixon Hall shelter sites	[ ]	[ ]	[ ]
Shelters run by other organizations	[ ]	[ ]	[ ]

Please share any additional thoughts/ideas about a Peer Work Program.

_____

_____

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8 Appendix A
Annotated Bibliography

A1 Annotated Bibliography: Resources for Further Learning and Practical Tools

This bibliography provides details about the content of the documents and websites cited throughout the Toolkit, including the sources of the "Tools from Other Sources" that are included in Appendix B. We have also included information about some additional recommended articles and reports. The bibliography is alphabetized by the name of the author, which may be either an organization or individual(s).

About this Resource List

Below is a list of recommended reports, guidebooks, tools, and other resources about employment of staff with lived experience of homelessness, staying in shelters, or other experiences common among shelter clients/residents, such as mental health or addictions challenges, or refugee experiences.

The research on employment of people with lived experience in shelters and homelessness services is limited, so we've included resources about employment of PWLE in other related social service and health sectors, such as supportive housing, mental health, and harm reduction.

These resources can help shelters to learn about:

- **The benefits of hiring staff with lived experience** (staff WLE), for the shelter organization and its clients.
- **Best practices** for recruiting, hiring, supporting, and promoting people with lived experience.

- **How to start, improve, or expand peer worker programs** and positions in their organization.

These resources may also be interesting for

- **people with lived experience** (PWLE) who are interested to work in any type of job in the homelessness, housing, social services, or health sectors, who would like to learn about:
  - » Benefits, challenges, and experiences that PWLE face when working in these sectors in Toronto and elsewhere, and when searching for jobs in these sectors
  - » What it's like to be a peer worker in shelters, homeless services, and other social service sectors
- **Employment services providers** who would like to assist people with lived experience to gain employment in these sectors

Ablavsky, E. et al. (2009). *Building Blocks to Peer Program Success: A Toolkit for Developing HIV Peer Programs.* https://ciswh.org/resources/HIV-peer-program-dev

Becu, A. & Allan, L. (2017). *Peer Payment Standards for Short-Term Engagement.* Vancouver, BC: BC Centre for Disease Control. http://www.bccdc.ca/resource-gallery/Documents/Education-al%20Materials/Epid/Other/peer_payment-guide_2018.pdf
- Recommendations on peer payment standards for ensuring that peers are compensated fairly. The guidelines were developed in collaboration with peers and service providers

Berbert, Chad and Richards, Jason (2019). *Cracking the Code of Effective Transformation. Cicero Institute.* https://cicerogroup.com/wp-content/uploads/2019/06/Ci-cero-Group-Cracking-the-Code-of-Effective-Transformation-1-1.pdf
- A brief guide to effective strategies and methods for organization culture transformation

Byrne, L., Chapman, M., Roennfeldt, H., Wang, L., Darwin,L. (2019). *Queensland Framework for the Development of the Mental Health Lived Experience Workforce*. Brisbane: Queensland Government - Queensland Mental Health Commission (QMHC). https://www.qmhc.qld.gov.au/sites/default/files/qmhc_lived_experience_workforce_framework_web.pdf

- Note: this document is referred to as QMHC (2019) *Full Report* when cited within the Toolkit.

- Provides a framework of seven key focus areas for fundamental organization change to facilitate successful employment of PWLE and integration of lived experience-designated roles throughout all parts of the organization, from part-time peer roles to HR to executive management. It also provides key best practices for each area. Key areas are:
  - » Understanding and defining roles
  - » Organisational commitment
  - » Defining roles
  - » Diversity and inclusion
  - » Human resources policies and practices
  - » Professional development and training
  - » Ongoing development

- "The framework aims to increase understanding of lived experience value and functions and provide clear information for organisations on how to structure and support lived experience roles." It focuses on employment of people with mental health and substance use challenges in a wide range of lived-experience-designated roles in the mental health workforce. The project webpage provides links to a variety of resources created throughout the project, including a **full-length toolkit**, a shorter **summary of the toolkit**, and a **poster** outlining key areas of organization transformation that are needed in order to become an exemplary employer of PWLE.

- Full project webpage for *Queensland Framework for the Development of the Mental Health Lived Experience Workforce:* https://www.qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/peer-workforce

Byrne, L., Chapman, M., Roennfeldt, H., Wang, L., Darwin,L. (2019). *Summary: Queensland Framework for the Development of the Mental Health Lived Experience Workforce*. Brisbane: Queensland Government - Queensland Mental Health Commission (QMHC). https://www.qmhc.qld.gov.au/documents/qmhclivedexperienceworkforceframeworksummarywebpdf

- Note: this document is referred to as QMHC (2019) *Summary* when cited within the Toolkit.

- Summary report of key points from the full report on the *Queensland Framework for the Development of the Mental Health Lived Experience Workforce*. For more information, see the bibliography citation for full report above.

Change Toronto. (2010). *Trusting Potential: The Benefits and How-to of Hiring People with Lived Experience Of Homelessness*. https://sites.google.com/site/changetorontosite/

- Recommendations for increasing and improving equity and employee success when employing PWLE of homelessness in social services. Includes recommendations for:
  - » All stages of the employment pathway
  - » All types of stakeholders who would be responsible for making changes (organizations, funders, etc).
  - » Diverse types of jobs

- Based on:
  - » Consultations with PWLE in Toronto who faced barriers to moving into careers in the homelessness and social services sectors
  - » Interviews with leadership/management and frontline staff.

Cyr, Céline; McKee Heather; O'Hagan, Mary; and Priest, Robyn. (2010 first edition / 2016 second edition). *Making the Case for Peer Support: Report to the Mental Health Commission of Canada, Mental Health Peer Support Project Committee. Mental Health Commission of Canada.* mentalhealthcommission.ca/wp-content/uploads/drupal/2016-07/ MHCC_Making_the_Case_for_Peer_Support_2016_Eng.pdf (general website: mentalhealthcommission.ca)

- Nation-wide Canadian research project to understand the value of peer support in mental health, and identify best practices (148-page report)
- Primary research with 600 PWLE participants, combined with extensive literature review
  » Included a group of First Nations, Metis, and Inuit participants from downtown Toronto.
- Excellent summary (on p. 7) of essential guidelines and strategies needed to enable peer support work to become widespread and successful in mental health care; could be adapted to shelters and supportive housing.

Daley, M., Egag, E. (2019). *Creating, Managing and Supporting Spaces for Young Adult Experts and Peers: Final Report 2019.* Loft Community Services. © Mardi Daley. https://www.homelesshub.ca/resource/creating-managing-and-supporting-spaces-young-adult-experts-and-peers-final-report-2019%C2%A0

- Report on benefits, barriers, and best practices around employing young adult experts and peers in the mental health, housing, and homelessness sectors. Practices focus on organizational readiness, ethical inclusion, and designing the peer role. Focused on youth who have lived experience related to these sectors.

Davidson, L., Chinman, M., Kloos, B., Weingarten, R., Stayner, D., & Tebes, J. K. (1999). Peer support among individuals with severe mental illness: A review of the evidence. *Clinical psychology: Science and practice, 6*(2), 165.

DBHIDS (2017). See full citation under "Philadelphia Dept. of Behavioral Health and Intellectual Disabilities Services."

East Scarborough Storefront. (2017). *Exploring Solutions in the Social Sector.* https://thestorefront.org/2017/wp-content/uploads/2018/05/ Exploring-Solutions-in-the-Social-Sector-FINAL-REPORT-.docx.pdf

- Report from research findings in Scarborough about barriers to employment in the social services sector for marginalized groups with barriers to employment; and strategies to overcome them.
- Includes plan for a supported training program, including volunteer placements, job-shadowing, etc.

European Federation of National Organisations working with the Homeless. (2015). *Peer Support: A Tool for Recovery in Homelessness Services.* feantsa.org/download/peer_support_policy_ paper2951723577548485776.pdf

- Practical overview of key concepts/definitions, benefits, challenges, and best practices around peer support in the homelessness sector, including roles that are formal and informal, paid and unpaid.

Fred Victor (2013). *Social Service Traineeships: A guide to developing paid training opportunities within the social service sector for people with lived experience of homelessness.* Available at: http://www.torontoshelternetwork.com/ the-shelter-sector-pipeline-project-resource-page

This report on Fred Victor's social service traineeships program outlines an excellent model for a social service traineeship program designed for PWLE, for roles not requiring them to disclose or draw on their lived experience (ie, not peer worker positions). The document includes:

- Detailed program description

- Evaluation of participant experiences and outcomes

- Easily-adaptable sample tools such as:
  » Job descriptions for trainees
  » Traineeship program application form
  » Best practices guidelines for supervisors
  » Evaluation forms for supervisors to assess trainee performance
  » Surveys for organizations to use to learn about lived experience in their staff team and understand the workplace experiences of their staff WLE

Habitat Services (2010). *Breaking Ground: Peer Support for Congregate Living Settings*. Wellesley Institute.
homelesshub.ca/sites/default/files/attachments/ Breaking_Ground_final_report.pdf

- Community-based research about formal and informal peer support in supportive housing settings in Toronto, including:
  » Residents' perspectives on the benefits and challenges of having peer support at their residence
  » Peer support workers from supportive housing sites, sharing their experiences and recommendations
  » Perspectives of management at organizations with peer support workers

- Recommendations for designing peer support work jobs/ programs that best meet the needs of the residents, the peer workers, and the supportive housing organization

- Recommendations for major systemic changes organizations could make to maximize the effectiveness of peer work

Health Commons Solutions Lab (2021). *Lived Experience @ Work*. City of Toronto.
healthcommons.ca/project/peer-work-dte

- This is a research project website with a number of excellent infographics and reports about:
  » The experiences of peer workers in diverse social services organizations in Toronto's Downtown East End (DTE)
  » Recommendations for improving the experiences and impacts of peers
  » Recommendations for expanding peer work in Toronto social services

- It was produced as part of the Lived Experience @ Work project, conducted for the City of Toronto as part of the Downtown East Action Plan.

- Reports include:
  » Recommendations for Organizations
  » Recommendations for the City
  » A New Peer Employment Pipeline (creative visions for the future)

Hire for Talent. (2017). *Employer Toolkit*. Restigouche Community Business Development Corporation (Restigouche CBDC).
https://hirefortalent.ca/toolkit

- Online toolkit for best practices around employment of people with disabilities, covering all stages of the employment pathway.

- Each section of the Hire for Talent Employer Toolkit is available both as a web page and as an individual PDF. When cited in the document, I provide the name of the section, and the page numbers that appear on the pages of that PDF.

Levesque, J., Sehn, C., Babando, J., Ecker, J., and Embleton, L. (2021). *Understanding the Needs of Workers in the Homelessness Support Sector.* Hub Solutions. homelesshub.ca/sites/default/files/attachments/ HubSolutions-Understanding-Needs-Oct2021.pdf

- 2021 study of the experiences and support needs of homelessness sector workers across Canada.

- Focused on
    » Needs for improvement of working conditions and supports on the job, including the non-standard needs arising due to COVID
    » Overview of homelessness sector labour market.

- In all sections of the report, it considers the unique experiences and needs of PWLE, and people of different gender, Indigenous, and racial identities. It also identifies needs for future research on these topics.

- Conducted cross-sectional national survey of frontline staff, interviews with executive directors.of homeless-serving organizations, and analysis of job postings.

Mental Health Commission of Canada, National Consumer Panel of the At Home/Chez Soi Project. (2011). *Stigma, discrimination, and PWLE knowledge: Discussion report.* housingfirsttoolkit.ca/wp-content/uploads/ Stigma_Discussion_Report_ENG.pdf

- A collection of pieces by PWLE about:
    » The **value of including PWLE** in all types of roles in projects and programs in the homelessness sector
    » **Stigma and descrimination** experienced by the authors when serving as advisors or staff for the At Home / Chez Soi project, a national homelessness research and action project
    » **Recommendations for reducing stigma** and creating more meaningful inclusion for PWLE in advisory and employment roles in the homelessness sector; and facilitating their career advancement.

Mental Health Commission of Canada. (March 2013). *Vancouver Peer Reference Group Report on Peer Support for Homelessness and Mental Health.* mentalhealthcommission.ca/sites/default/files/Housing_At_Home_ Peer_Reference_Group_Report_Vancouver_FINAL_ENG_0.pdf

- Very useful information on:
    » Good design for peer work programs
    » How to create/run PWLE advisory groups and engage PWLE throughout the development of a peer work program or project in the homelessness and mental health sectors

- Excellent survey tools for soliciting input from
    » Peer workers
    » Clients who received support from them

Ontario Human Rights Commission (2005, minor revisions 2009). *Policy and guidelines on racism and racial discrimination.* ISBN: 0-7794-8397-9. https://www.ohrc.on.ca/en/policy-and-guidelines-racism-and-racial-discrimination

- Recommended tool: Appendix – Workplace policies, practices and decision-making processes and systemic discrimination, pp. 54-57.

- Excellent factsheet (in a table format) that describes best practices for recruitment, hiring, retention, and promotion of marginalized groups. It identifies barriers, then describes best practices to address each barrier.

Philadelphia Dept. of Behavioral Health and Intellectual Disabilities Services and Achara Consulting Inc. (2017). *Peer Support Toolkit*. Philadelphia, PA: DBHIDS. https://dbhids.org/peer-support-toolkit

- Comprehensive guide combining information and practical tools, organized into four modules
  » Module 1: Preparing the Organizational Culture
  » Module 2: Recruiting and Hiring Peer Staff
  » Module 3: Service Delivery (about different types of roles peers can play in behavioral health services, and how to do these jobs well)
  » Module 4: Supervision and Retention
- From the description on the toolkit website:
  » "Designed to support behavioral health treatment agencies with the process of integrating peer providers into their service settings"
  » "Designed to help agencies to recruit, retain, and effectively deploy people in recovery in a variety of peer support roles."
  » "Structured as an interactive PDF that presents key information in brief reads, yet preserves your opportunity to delve deeper into subjects...with just a click."

Phillips, K., & Harrison, J. (2019). *Supervising Peer Workers: A Toolkit for Implementing and Supporting Successful Peer Staff Roles in Mainstream Mental Health and Substance Use/Addiction Organizations*. Centre for Excellence in Peer Support and Centre for Innovation in Peer Support. cmhawwselfhelp.ca/wp-content/uploads/2016/11/Supervising-Peer-Workers-Toolkit-CMHA-WW-2019.pdf

- Guide on how to effectively supervise peer workers
- Also addresses organization readiness, hiring, and onboarding.

- Includes many practical tools such as:
  » Organizational readiness checklist
  » Sample job description
  » Worksheet for developing role clarity for peers at your organization
- Aimed at mental health and substance use organizations, but largely applicable to shelters as well.

St. Stephen's Community House (March 2017). *Learning By Doing: Peer Project How-to Manual*. sschto.ca/About-Us/Social-Action/Peer-Toolkit

- Practical guide for social service organizations interested to launch or expand peer programs within their organizations.
- Includes many practical tools such as:
  » Worksheets to use in the planning process
  » Sample job descriptions
  » Sample interview questions
- Relevant to peer work roles with a diverse range of:
  » Responsibilities, from advocacy to counselling,
  » Levels of formality, from casual volunteering to full-time jobs
  » Time period, from a few months to a few years
- Oriented primarily toward peer programs - ie, where a group of peers are selected, trained, assigned placement or jobs within an organization (or multiple organizations) and provided with supports throughout.
- However, it has many tools and tips that are useful for any peer worker position, related to:
  » Job design
  » Recruitment
  » Inclusion
  » During-employment supports

Welford, Dr. J., Milner, C., and Moreton, R. (2021). *Involving People with Lived Experience in the Workforce: Workforce development and multiple disadvantage.* CFE Research and the University of Sheffield. https://www.tnlcommunityfund.org.uk/media/insights/documents/Involving-people-with-lived-experience-in-the-workforce-2020.pdf

- Excellent research report on benefits, barriers, and best practices around employment of people experiencing "multiple disadvantages, including including homelessness, alcohol and substance misuse, reoffending, mental ill-health, domestic violence and physical and learning disabilities" (Welford, 2021).

- Contains some specialized information focused on employment in social services, but also addresses employment in all sectors for people experiencing these types of employment barriers.

- Provides links to evaluations of peer mentoring programs run as part of the Fulfilling Lives programme in the UK, to improve the support available for people who experience multiple disadvantage, so that individuals are better able to manage their lives.

Working Well Together Technical Assistance Centre. (2014). Toolkit for Employing Individuals with Lived Experience Working Within the Public Mental Health Workforce. children.wi.gov/Documents/wwt_toolkit_final_6-10-14.pdf

- This 300-page toolkit has a wealth of recommendations and practical tools that shelters could adapt for use in all stages of the employment pathway including:
  » Setting the stage for successful employment:
    • Creating a healthy work environment
    • Developing accommodations policies
    • Stigma reduction initiatives
  » Job position development and job description preparation
  » Recruitment
  » Hiring
  » Supportive supervision

- This document is from the United States, so there are sections related to the policy environment that are not relevant, but most content is applicable in the Canadian context

A2 Full Toolkits/Guides from Other Organizations on Employment of PWLE

A number of organizations in Toronto and beyond have developed excellent and comprehensive written guides/toolkits for organizations about

- employing staff with lived experience, and/or
- how to design and implement peer programs and other work opportunities designated for PWLE.

A selection of recommended guides/toolkits is below. Each guide has a distinct focus in terms of:

- The sectors of employers that are the target audience
- The types of lived experience of the PWLE
- What categories of jobs are covered (i.e., peer programs only; all LE-designated positions; all types of jobs)
- Geographic location for which it was designed, and/or where the research was done to inform development of the guide

However, each guide either:

1. Is aimed at a broad range of non-profit sectors and/or focuses on employment of people with diverse types of lived experience; or

2. targets employers in sector(s) that fully or partially overlap with the shelter sector (eg, social services, mental health), and is focused on employment of PWLE with type(s) of LE that are common among shelter residents

Full bibliographic information and brief descriptions of these guides are available in the A1 Annotated Bibliography, p. 117, which is sorted alphabetically by author. If author names are not listed below, the organization identified as the source of the document is considered the author.

Building Blocks to Peer Program Success: A Toolkit for Developing HIV Peer Programs.
Toolkit from The PEER Center, a collaboration of U.S. organizations (Authors: Ablavsky, E. and others)
https://ciswh.org/resources/HIV-peer-program-dev

Hire for Talent
Online toolkit for employment of people with disabilities, from Restigouche Community Business Development Corporation
https://hirefortalent.ca/toolkit

Involving People with Lived Experience in the Workforce
Report from The West Yorkshire Fulfilling Lives: Supporting People with Multiple Needs Programme, known as West Yorkshire - Finding Independence (WY-FI). (Authors: Dr. Jo Welford and others)
https://www.tnlcommunityfund.org.uk/media/insights/documents/Involving-people-with-lived-experience-in-the-workforce-2020.pdf

Learning By Doing: Peer Project How-to Manual
Guide by St. Stephen's Community House
https://www.sschto.ca/About-Us/Social-Action/Peer-Toolkit

Lived Experience @ Work
Full project website with reports and infographics, by Health Commons Solutions Lab for the City of Toronto
https://www.healthcommons.ca/project/peer-work-dte

Peer Support Toolkit
Toolkit from Philadelphia Dept. of Behavioral Health and Intellectual Disabilities Services
https://dbhids.org/peer-support-toolkit[1]

Queensland Framework for the Development of the Mental Health Lived Experience Workforce.
Framework overview and best practices tipsheets from the Queensland Mental Health Commission (QMHC) (Authors: Byrne.L. and others).
https://www.qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/peer-workforce

Supervising Peer Workers: A Toolkit for Implementing and Supporting Successful Peer Staff Roles in Mainstream Mental Health and Substance Use/Addiction Organizations Toolkit from the Center for Excellence in Peer Support (Authors: K. Phillips and J. Harrison)
https://cmhawwselfhelp.ca/wp-content/uploads/2016/11/Supervising-Peer-Workers-Toolkit-CMHA-WW-2019.pdf

Toolkit for Employing Individuals with Lived Experience Working Within the Public Mental Health Workforce
Extensive toolkit and report by Working Well Together Technical Assistance Centre
https://children.wi.gov/Documents/wwt_toolkit_final_6-10-14.pdf

9 Appendix B: Copies of Tools from Other Sources

B1 List of Tools from Other Sources Included in Appendix B - by Topic

Appendix B provides copies of the Tools from Other Sources that were listed at the end of each of the following chapters of this Toolkit:

- Chapter 2 – Organization Change: Laying the Foundations
- Chapter 3 – Recruitment and Hiring
- Chapter 4 – Onboarding
- Chapter 5 – During Employment and Career Advancement

For information about the sources of these tools, including full citations, see section **A1 Annotated Bibliography: Resources for Further Learning and Practical Tools** on page 117. Copies of many of these tools are provided in **B1 List of Tools from Other Sources Included in Appendix B**, p. 127.

Note: some of the recommended tools listed in the chapters may not be included in Appendix B due to copyright restrictions or length. These can be accessed by going back to the original source online (see URL in Annotated Bibliography) and navigating to the page number provided in the list.

B2 Tools for Organization Change: Laying the Foundations

B3 Tools for Recruitment and Hiring

B4 Tools for Onboarding

B5 Tools for During Employment and Career Advancement

B2

Tools for Organization Change: Laying the Foundations

Developing a Healthy Work Environment

The workplace is one of the key environments that can affect our mental wellbeing and health. There is growing awareness of the role of work in promoting or hindering mental wellness. It makes sense that the workplace, no matter the setting, is critical in ongoing recovery and mental health.

A healthy work environment is important for the overall health of all employees including those hired for their lived experience. Public mental health work environments are no different than other work environments in terms of the need for a focused attention on making it safe, productive, and empowering. Healthy work environments have been linked with employee engagement and organizational commitment. These environments are characterized by a high level of trust between management and employees; by employees who treat each other in a respectful manner; by an organizational culture that supports skilled communication and collaboration; and by a climate in which employees feel emotionally and physically safe (Shirey, 2006).

The National Quality Institute in Canada reports that there are three factors which influence the health or wellness of the organization and its employees (Health Canada, 1992 & National Quality Institute, 1998). These include:

Health & Safety: The environment in which people work is a major influence on employee health.

Culture & Social Environment: Basic human needs such as sense of belonging, purpose and mission, sense of control and freedom from harassment. Some of these related issues might include:

- Balance between work and family
- Staff involvement in decision making
- Flex time
- Peer communication

- Employee training and development
- Employee satisfaction
- Positive supervisor communication and feedback
- Staff morale
- Employee recognition
- Social atmosphere

Lifestyle Practices of Employees: Workplaces that support health practices encourage healthy behaviors/coping skills such as smoking cessation, personal health, stress management, and alcohol and drug use.

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.1 Developing a Healthy Work Environment

Source: Working Well Together (2010), pp. 17-19

Healthy work environment practices include research from professions and arenas outside of the public mental health workplace. But, much of this research has provided sound practices toward providing a supportive and nurturing workplace for all persons and would be essential to those with lived experience.

> Creating mentally healthy workplaces will require strategies that:
> - Promotes well-being for all staff, especially those with lived experience;
> - Addresses work-related mental health problems;
> - Creates a safe environment for sharing mental health needs; and
> - Supports staff that experience mental health issues or needs.

Healthy environments within the public mental health workplace cannot be overlooked as important for employees with lived experience as they are often living the same challenges as the peers they assist. A strong and safe work environment will contribute to their overall wellbeing and offer them an opportunity to grow and develop within an emerging professional workforce.

A mentally healthy workplace is not a special promotion for those hired with lived experience. To be authentic in intent and effort, a mentally healthy workplace should be a basic benefit for all employees.

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B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.1 Developing a Healthy Work Environment

Source: Working Well Together (2010), pp. 17-19

Healthy Work Environment Resources

Mentally Healthy Workplaces Online Course - For Employees

This is for anyone who wants to learn more about mental health, whether it is how to look after your own health or advice on supporting a colleague. It will take about one to two hours to complete and can help your organization in working towards their HWL Award. To complete the course you will need to register on Health Scotland's VLE, this will only take a few minutes. Follow this link and instructions.

http://www.healthyworkinglives.com/documents/4908.aspx

The Cardiff Work Environment Research Centre (CWERC)

This is a center of excellence for research, undertakes research in the areas of the work environment, health and safety, work and well-being, and related subjects; providing an authoritative source of expert advice on these topics, and contributing to the future of policy development in the UK and further afield.

http://www.cf.ac.uk/cwerc/index.html

Flexible schedules and results-oriented work environments

News release regarding new U of M research finding that flexible schedules and results-oriented work environments reduce work-family conflict and turnover, written by Tessa Eagan, College of Liberal Arts, University of MN.

http://www1.umn.edu/news/news-releases/2011/UR_CONTENT_316944.html

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.2 Scanning Mental Wellness (a healthy work environment evalution)

Source: Working Well Together (2010), pp.22-24

Scanning Mental Wellness
(a healthy work environment evalution)

Scanning Workplace Mental Wellness

Use the following questions to assess the workplace attention to the mental wellness of all employees.

WORKPLACE CULTURE

❑ Do workplace values reflect concern for well-being of employees?

❑ Is there a strategic process in place to monitor employee morale on a regular basis?

❑ Do communication practices encourage open communication about all issues that could impact employee performance?

❑ Are several approaches to gathering feedback available at all levels of the organization?

❑ Does the workplace view mental health promotion in the workplace as an investment in a stable and productive work?

❑ Is there a formal and consistent process to examine workplace culture and the products and services and their potential impact on mental wellness?

❑ Does the workplace have a no tolerance policy regarding prejudice about mental health?

❑ Does the workplace process consider how behaviors negatively impact mental health?

❑ What (specifically) does the workplace do to promote mental health and wellness?

POLICIES AND PRACTICES Mental Health Benefits

❑ Are mental health benefits offered?

❑ Have these been reviewed for adequacy, accessibility, and affordability?

❑ Are they covered at the same level as other physical disorders?

❑ Do they respond to the chronic nature of mental disorders?

❑ Does the workplace allow for medical leave for a mental health crisis?

❑ Upon return, is there a policy for:

    ❑ Post-treatment support

    ❑ Return-to-work assistance

    ❑ Is there a no tolerance policy for stigma, bullying, and discrimination in the workplace?

    ❑ Are policies relative to stigma, bullying, and discrimination a required component of employee orientation?

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B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.2 Scanning Mental Wellness (a healthy work environment evalution)

Source: Working Well Together (2010), pp.22-24

MAXIMIZING RESOURCES

❑ Is the workplace aware of general local resources (e.g., toll free referral numbers or websites) or employee assistance programs in case a referral for mental health treatment is needed?

❑ Are these referrals low cost (or free) and without a lot of pre-authorizations or referral requirements?

❑ How does your workplace re-integrate an employee who has been on mental health leave for a mental health crisis?

❑ Is there a process for partnering with community providers beyond the services population; i.e. staff and their families?

ACCOMMODATIONS

❑ Does the workplace understand their responsibilities relative to "reasonable accommodations" for individuals who would otherwise be fully qualified to overcome the challenges they face as the result of a mental disability?

❑ Are these disability management efforts coordinated by a disability manager?

❑ For small businesses or organizations without a Human Resources Department, is there another person designated to be responsible?

TRAINING

❑ Does the workplace routinely have educational programs on mental health topics (beyond stress and conflict resolution)?

❑ Is this training for all employees, but especially for supervisors and managers, in order to create a workplace culture that has a full understanding of mental health issues and that values individuals who might struggle with mental disorders?

❑ Does training exist specifically for suicide prevention?

❑ Are all trainings and trainers competent in the cultural, ethnic, racial, and linguistic representations of the workplace?

❑ Are trainings offered in several modalities to facilitate participation?

SOCIAL MARKETING

❑ Does the workplace distribute printed material (brochures/posters/fact sheets) promoting

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B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.2 Scanning Mental Wellness (a healthy work environment evalution)

Source: Working Well Together (2010), pp.22-24

mental health or educating employees about mental disorders?

❑ Are mental health screening days (e.g. depression, anxiety, and alcohol abuse) promoted in the workplace, encouraging employees to take a confidential self-assessment?

❑ Does the workplace ensure that it cares about the mental wellness of its employees as well as those it serves in it materials, resources, and promotions?

(Adapted from: Working Minds, How Healthy is your Workplaces? www.workingminds.org)

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team)

Source: Fred Victor (2013), pp.28-32

Appendix 1: Fred Victor Staff Survey

Fred Victor Staff Survey

Through Fred Victor's strategic plan, the organization has committed to engaging people with lived experience of homelessness and poverty in planning, operations and decision-making to improve outcomes for service users. Part of this strategic goal involves achieving a targeted hiring of people with lived experience of homelessness and poverty.

This anonymous survey is being conducted to find out more about the experiences of Fred Victor employees. This survey will be used to learn how many current FV employees have had personal experiences with homelessness, poverty or other factors that can lead to marginalization.

The information gathered through this anonymous staff survey will be used to:

- Determine how the Fred Victor staff team currently reflects the Fred Victor community;
- Assist in determining appropriate hiring targets for people with lived experience of homelessness and poverty;
- Challenge stigma related to hiring people with lived experience of homelessness and poverty.

The survey will be tabulated and a final report will be prepared by Joyce Brown with the Ontario Council of Alternative Businesses. The final report will be shared with all staff.

The Staff Survey Committee understands that we are asking personal questions, do not feel obligated to respond to all questions. If you do not understand a question, please feel free to contact a member of the Staff Survey Committee or skip the question.

1. Are you frontline staff or management?
   - ☐ Frontline (includes administration and facilities staff)
   - ☐ Management

2. How have you been involved with Fred Victor? (Please check all that apply)
   ☐ Volunteer ☐ Student ☐ Service user ☐ Frontline staff ☐ Management

3. What is your age range?
   ☐ Under 30 ☐ 31-40 ☐ 41-50 ☐ 51-60 ☐ 60+

4. Do you consider yourself to be: (Please check all the apply)
   ☐ Female ☐ Male ☐ Genderqueer ☐ Intersex ☐ Trans Identified ☐ Two Spirited

   If you do not relate to any of the above, then please specify: _____

5. Do you consider yourself to be: (Please check all the apply)
   ☐ Straight/Heterosexual ☐ Gay ☐ Lesbian ☐ Asexual ☐ Bisexual ☐ Pansexual ☐ Queer
   ☐ Questioning ☐ Same Gender Loving ☐ Two Spirited

   If you do not relate to any of the above, then please specify: _____

6. Which of the following reflect your ethno-racial background? (Please check all that apply)
   - ☐ Aboriginal (First Nations, Métis or Inuit)

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team)

Source: Fred Victor (2013), pp.28-32

☐ Latin American (e.g. Argentina, Mexico, Nicaragua)

☐ East Asian (e.g. China, Japan, Korea, Taiwan)

☐ Afro-Caribbean (e.g. Jamaica, Trinidad)

☐ Indo-Caribbean (e.g. Guyanese with origins in India)

☐ South Asian (e.g. India, Sri Lanka, Pakistan)

☐ Middle Eastern (e.g. Egypt, Iran, Israel, Saudi Arabia)

☐ South East Asian (e.g. Vietnam, Malaysia, Philippines)

☐ White Canadian or White American

☐ White European (e.g. England, Greece, Sweden, Russia)

☐ Black Canadian or African-American

☐ Black African (e.g. Ghana, Kenya, Somalia)

☐ Canadian

If you do not relate to any of the above, then please specify: _____

7. Where were you born?

☐ Canada

☐ Outside of Canada. Please specify:_____

    a) If born outside of Canada, how long have you lived in Canada?

    ☐ Less than 3 years   ☐ 3-5 years   ☐ 5-10 years   ☐ Over 10 years

8. Is English your first language?

☐Yes   ☐ No

    a) If English is not your first language, has language been a barrier to employment?

    ☐ Yes   ☐ No

    b) What other languages do you speak (including American Sign Language)?

    _____

9. Do you have a religious, faith or spiritual practice?

☐Yes   ☐ No

    a) If yes, please specify: _____

10. Have you experienced abuse and/ or violence (including verbal abuse or threats)?

☐Yes   ☐ No

11. Do you identify with having, or having had a mental health concern that significantly impacted your life?

☐Yes   ☐ No

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team)

Source: Fred Victor (2013), pp.28-32

12. Do you identify with having or having had an addiction concern that significantly impacted your life?

☐ Yes ☐ No

13. Are you currently living with any of the following? (Please check all that apply)

☐ Autism, Aspergers or neuro-diverse spectrum

☐ Blind, low vision or visual impairment

☐ Chronic illness

☐ Chronic pain

☐ Communication disability (use of augmentative or alternative communication)

☐ Deaf, deafened or hard of hearing

☐ Labelled with an intellectual disability

☐ Learning disability

☐ Physical or mobility disability

☐ No, I do not have a disability

☐ Other (please specify):_____

14. Have you experienced or are you currently experiencing poverty (including receiving social assistance, working poor, no income, not meeting basic needs, etc.)?

☐ Yes ☐ No

   a) If yes, how long have you experienced poverty (in total if more than one occasion)?

      ☐ Under 6 months ☐ 6 months-1 year ☐ 1-2 years ☐ 2-3 years ☐ 3+ years

15. Have you ever been, or are you currently homeless?

☐ Yes ☐ No

   a) If yes, have you ever? (Please check all that apply)
      o Slept rough (sleeping outside)
      o Stayed in a hostel/shelter
      o Lived in supportive or transitional housing
      o Couch surfed (staying with friends, family, etc.)
      o Stayed in temporary accommodation (hotels, etc.)
      o Stayed in unsafe accommodations
      o Other (please specify):_____

   b) Please specify how long you were homeless (in total if more than one occasion):

      ☐ Under 6 months ☐ 6 months-1 year ☐ 1-2 years ☐ 2-3 years ☐ 3+ years

16. Have you experienced unemployment?

☐ Yes ☐ No

   a) If yes, have you experienced reoccurring unemployment?
      o Yes - if yes, please specify how many times?_____
      o No

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team)

Source: Fred Victor (2013), pp.28-32

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b) Please specify the length of your longest period of unemployment:

☐ Under 6 months ☐ 6 months-1 year ☐ 1-2 years ☐ 2-3 years ☐ 3+ years

17. What is your highest level of education (international and domestic)?

☐ Elementary School ☐ High School ☐ GED

☐ Post-Secondary (college, university) ☐ Apprenticeship

a) Have you completed a post-secondary education related to social services work (social work, behaviour sciences, community worker, etc.)?

☐Yes ☐ No

b) Are you currently in school in a program related to social services work?

☐Yes ☐ No

Additional Optional Questions

Over the upcoming months, Fred Victor will be applying for funding to implement a year-long, paid traineeship program for four individuals with personal experience with homelessness and with a strong desire to work in the non-profit sector. In order to prepare for the traineeship positions to begin, the Staff Survey Committee feels it would be beneficial to get your responses to the following optional questions. Your feedback on these questions is appreciated, but you are not required to respond.

18. Have you felt devalued and/or marginalized at Fred Victor due to any of the following?

☐Yes ☐ No

If yes, please select all that apply:

☐ Age

☐ Gender identity

☐ Sexual orientation

☐ Ethno-racial background

☐ Language

☐ Immigration, refugee and/or settlement experience

☐ Religion, faith and/or spiritual practice

☐ Experience of abuse/violence

☐ Mental health

☐ Addiction

☐ Disability

☐ Experience of poverty

☐ Experience of homelessness

☐ Past unemployment

☐ Education level

☐ Other, please specify:_____

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.3 Fred Victor Staff Survey (to learn about the lived experiences of your staff team)

Source: Fred Victor (2013), pp.28-32

> a) If so, by whom? (Please select all the apply)
> - ○ Fred Victor employee (including frontline and management)
> - ○ Service User
> - ○ Other, please specify: _____
>
> b) If yes, was support provided to you? (Please describe):_____
>
> 19. Have you disclosed any of the following at Fred Victor? (Please select all that apply)
> - ☐ Gender identity
> - ☐ Sexual orientation
> - ☐ Ethno-racial background
> - ☐ Immigration, refugee and/or settlement experience
> - ☐ Religion, faith and/or spiritual practice
> - ☐ Experience of abuse/violence
> - ☐ Mental health concern
> - ☐ Addiction
> - ☐ Disability
> - ☐ Experience of poverty
> - ☐ Experience of homelessness
> - ☐ Past unemployment
> - ☐ Education level
>
> > a) Did you feel you needed support after you disclosed any of the above?
> >
> > ☐Yes   ☐ No
> >
> > b) If yes, did you feel you received support? (Please describe):_____
>
> c) If you haven't disclosed, why not? (Please describe):_____
>
> 20. Please add any additional comments:
>
> **Thank you for completing the Fred Victor Staff Survey!**
>
> The results of this survey will be distributed to all Fred Victor staff.
>
> The information gathered through this anonymous staff survey will be used to:
>
> - Determine how the Fred Victor staff team currently reflects the Fred Victor community;
> - Will assist in determining appropriate hiring targets for people with lived experience of homelessness and poverty;
> - Will be used to challenge stigma related to hiring people with lived experience of homelessness and poverty.
>
> If you have any questions or comments about this survey, please contact any of the members of the Staff Survey Committee:
>
> **Agnes Forfa, Debbie Dos Ramos, Ellen Kahsay, Mandy Ashton, Michelle Taylor, Steve Morrissey**

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.4 Key Focus Areas Infographic
Source: QMHC Summary (2019), pp. 4-8

Key focus areas

The key focus areas of the framework identify what is important and needed for effective lived experience workforce development and to maximise the benefits of lived experience work for people, accessing services, working in lived experience roles, colleagues and organisations.

The key focus areas are:
1. Understanding and defining lived experience roles
2. Organisational commitment
3. Workplace culture
4. Diversity and inclusion
5. Human resources policies and practices
6. Professional development and training
7. Ongoing development

Maximising the benefits of lived experience work for
- lived experience workers
- people accessing services
- organisations
- colleagues

Respecting and valuing lived experience in the mental health workforce is broader than designated lived experience roles.

Understanding and defining lived experience roles

Understanding and defining roles is essential for managers and organisations to build an effective lived experience workforce. High-level understanding and clear definition of roles is evident when the lived experience workforce is well-defined, diverse and supported to be authentic.

What does emerging best practice in understanding and defining roles look like?
- Exposure to lived experience concepts, research, leaders and work
- Develop a network of organisations building a lived experience workforce to encourage mutual learning
- Provide clear position descriptions
- Acknowledge unique cultural differences and the value of specialisations
- Understand that lived experience work should never be involved either explicitly or implicitly in coercive or restrictive practice

Benefits of having a clear understanding and well-defined lived experience workforce:
- Increased understanding of how best to design, utilise and support lived experience workers
- Motivation to ensure lived experience practices are authentic and well-supported
- A more effective lived experience workforce
- A more diverse lived experience workforce with greater access to people from diverse cultural backgrounds and with diverse experiences, orientation and identification
- Lived experience work is understood for its unique contribution in building relationship/rapport with people accessing services in a more equitable way
- Lived experience work is supported to be authentic

Organisational commitment

Organisational commitment includes the philosophical and financial commitment made by organisations. This commitment is reflected in both the workplace culture and human resources polices and practice.

Organisational commitment is increased by greater exposure to lived experience roles/concepts that in turn increase understanding and perceived value of lived experience roles.

What does emerging best practice in organisational commitment look like?
- Management actively champions lived experience roles to ensure uniqueness is protected
- Lived experience positions are continually created, including lived experience leadership roles with the potential for impact
- Sufficient numbers of lived experience roles are developed to allow the work to be embedded (not an add-on)
- Ongoing and adequately resourced commitment to lived experience workforce
- Value of lived experience is included in the mission statement/core values of the organisation

Benefits of organisational commitment
- Enhanced recovery orientation and more person-directed services
- Organisation develops/demonstrates a willingness to be adaptable, flexible and open to change
- Integrity of lived experience roles are maintained
- The lived experience workforce is sustainable and valued across the organisation
- Organisation is seen as a leader of lived experience practice
- People accessing services see their lived experience as valued by the organisation

Key focus areas

Workplace culture

Workplace culture is determined by the attitudes and beliefs of people in the organisation. A culture that views lived experience as unique, valuable and essential allows the roles to be meaningfully embedded.

What does emerging best practice in workplace culture look like?

- Prepare and plan before and after employing lived experience, including promotion of the value of roles at all levels of the organisation
- The value of lived experience work and perspectives is actively promoted by senior and executive management
- Championing of lived experience occurs at all levels of the organisation
- Lived experience worker are understood and valued across all levels of the organisation
- Open communication and ongoing training to develop and maintain mutual understanding between lived experience worker and non-lived experience roles
- Effective collaboration and co-production between lived experience worker and non-lived experience roles
- Whole-of-workplace strategies prioritise the wellbeing of all employees
- People in non-lived experience roles are safe to disclose lived experience and feel comfortable to do so

Benefits for workplace culture

- Mutual understanding and respect between lived experience and non-lived experience roles
- Lived experience workers are understood, valued and supported
- Greater work satisfaction, feelings of support, value and belonging for all employees
- Person-directed and recovery-orientated practice is strengthened

Diversity and inclusion

Because lived experience work with people from diverse cultures and experiences, it's important the lived experience workforce includes people from diverse cultures and experiences. To do this effectively, organisations need to respect and show understanding of diverse perspectives and needs and embrace a variety of unique contributions.

What does emerging best practice in diversity and inclusion look like?

- Acknowledging that Western concepts of 'mental health' are not shared across all cultures. Building a culturally inclusive workforce to ensure different ideas and concepts are embraced, encouraged and valued
- Preparing, educating and communicating with the workplace to welcome and understand roles from diverse cultural backgrounds and experiences
- Ensuring the workplace is flexible and committed to meeting the needs of different cultures and diverse experiences by promoting policies and practices that are respectful and considered
- The lived experience workforce includes different cultures and experiences relevant to the people accessing services
- Reasonable adjustments including accessibility are addressed and readily available
- The organisation acknowledges the impacts of trauma, previous experiences of marginalisation and respects the needs of staff to respond to cultural commitments and community/family responsibilities

Benefits of diversity and inclusion

- Culturally safe/respectful organisation with increased sensitivity and kindness
- Decrease in unplanned leave for cultural reasons and less fear in asking for time-off
- Lived experience workforce is culturally inclusive and includes people from diverse backgrounds, orientations, identification
- Traditional practices are given a place alongside western medical treatment and perspectives
- Lived experience workers better represent and respond to the cultural diversity of service users
- Acknowledging the important role of connection to land, community, family and spirituality. Demonstrating good cultural understanding and building connections/respect within the community
- Greater retention of culturally diverse workforce
- Improved connections and relationships with local diverse communities and cultures

Human resources policies and practices

The role of human resources policy and organisational process is key to an effective lived experience workforce. Policy and practice need to be aligned with values that support and maintain an effective lived experience workforce. Policy and practice are tangible outcomes of commitment by organisations and help formalise and maintain accepting workplace culture.

The potential for lived experience involvement/designated lived experience roles in human resources may assist in supporting lived experience workforce development and promoting a workplace that supports anyone who has a lived experience.

What does emerging best practice in human resources policy and practice look like?

- Policies and practices support the value and uniqueness of lived experience work including no lived experience involvement with restrictive or coercive practices
- Lived experience-led or co-produced training for the whole organisation, including at induction, assists to increase understanding and embed lived experience roles
- Lived experience leaders help guide lived experience workforce development
- Suitable recruitment processes and job descriptions informed by lived experience concepts and leaders are used
- Lived experience leadership roles at any level of the organisation are held by people with a deep understanding of lived experience work and concepts, not just an individual lived experience perspective
- Lived experience workers receive appropriate salary and adequate work hours for their role
- Reasonable adjustments are openly acknowledged as part of the legal rights of all employees

Benefits of lived experience-friendly human resources policy and practice

- Lived experience work is valued and lived experience roles can work from their unique perspective
- Improved role clarity and understanding of lived experience work
- Mutual understanding, respect and collaboration between lived experience and non-lived experience roles
- Employing the right person for the job based on the appropriate skills and knowledge
- Increased job satisfaction, feelings of support, value and belonging for all
- Improved understanding of legislation and rights
- Lower turnover of staff
- Increase in organisational knowledge that cannot be taught through traditional learning channels

Professional development and training

Key to developing and sustaining a strong lived experience workforce are opportunities to develop, define, refine, and clarify the knowledge and skills needed to be effective in lived experience roles.

What does emerging best practice in professional development and training look like?

- Appropriate and timely supervision is provided, including lived experience supervision
- Opportunities for career progression within lived experience roles
- Opportunities for lived experience are provided for coaching, sharing and learning
- Access to role specific training and traineeships at various levels of education, including certificates through to research higher degrees
- Networking, communities of practice/conferences are available to lived experience

Benefits of professional development and training

- Lived experience workforce is well-supported
- Strong role clarity is provided for lived experience
- Higher skilled, purposeful, self-directed, reflective and ethical lived experience workforce
- Strong networks with other lived experience and organisations employing lived experience
- Opportunities for cross-fertilisation and collaboration across the sector

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Tool B2.4 Key Focus Areas Infographic
Source: QMHC Summary (2019), pp. 4-8

Key focus areas

Ongoing development

While much has been learned and achieved, the lived experience worker is still developing and there are areas of consideration for ongoing, sustainable workforce development.

What does emerging best practice in ongoing development look like?

- Lived experience leadership roles in all relevant organisations including funding bodies
- Lived experience roles across all levels of organisations
- Lived experience on boards, tender and recruitment panels, induction process and committees
- Increased funding targeted at developing the lived experience workforce
- KPIs in contracts to ensure adequate lived experience involvement
- An independent and adequately resourced lived experience peak body
- Ongoing and effective promotion of lived experience workforce
- Development of award wages and other industrial issues addressed
- Mentoring and formal networks created to allow resource and knowledge sharing between organisations committed to lived experience work
- Training and specific supervision for supervisors of lived experience workers
- Additional lived experience specific qualifications for various points of career progression
- More lived experience role specific training focusing on the unique features of lived experience roles, must be lived experience-led and delivered
- Increased lived experience leadership/co-production of research and dedicated funding for lived experience research
- Targeted positions for lived experience researchers, teachers/lecturers and engagement officers
- Lived experience is identified as desirable and valued within all roles, not just designated roles
- Pro-active policies to ensure cultural diversity within the lived experience workforce
- Exploring language and shared definitions of 'mental health' that are culturally appropriate
- Significant development of lived experience roles and lived experience training in regional, rural and remote areas
- Further development of designated lived experience roles within sectors outside mental health

Benefits of ongoing development

- Lived experience has a stronger and more consistently heard voice and given greater priority in budgets, planning and funding
- Organisations are more motivated and equipped to progress effective lived experience worker development
- Ongoing career progression for lived experience and organisations retaining highly skilled lived experience workers
- Full potential of lived experience explored, leading to increased benefits for organisations, colleagues and people accessing services
- Increased lived experience roles in regional/rural/remote areas
- Increased access to support/education/best practice
- Culturally appropriate policies, language and definitions are created for improved diversity and inclusion
- Diverse needs are met within a culture of safety

To view the full framework and support resources, scan this QR code or download from the Queensland Mental Health Commission's website: qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/peer-workforce

Queensland Mental Health Commission

B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness)

Source: Change Toronto (2010), pp. 7-14

Strategies and Actions

The following 10 strategies and the corresponding actions came from the recommendations of focus group participants.

1. *Develop more inclusive organizational policies and practices*

   Policy reviews and updates

   While most organizational policies exist to protect staff and community members, many policies create barriers for PWLE when trying to find employment within the sector. Policies can be reviewed and changed through the following recommendations:

   - Organizations can conduct policy audits to review and update policies and determine which policies need to be changed to be more equitable.
   - Community members can be involved in policy audits, since they will be aware of the policies that impact them the most.
   - Organization staff must ensure collective agreements do not create barriers for PWLE.
   - Community groups can conduct policy audits to review government policies to ensure they encourage inclusion.

2. *Value personal and lived experience*

   Create full time positions

   While peer positions are a start, ensuring that PWLE have access to full time positions should be the ultimate goal.

   - Organizations should ensure that PWLE are paid fairly and equitably, given benefits and recognized for their contributions to organizations.
   - Organizations should ensure that new staff members who have health issues have access to flexible hours, sick time and sick leave.

   Recognize volunteers

   Volunteers provide a lot to organizations and should be recognized for their efforts by:

   - Organizations can recognize the contributions of volunteers through honoraria and covering transportation costs, particularly for those sitting on boards and other decision-making bodies within an organization.
   - Organizations should ensure that volunteer time counts toward an organizational credit when applying for work.

   "I participate in a lot of volunteer work. A wage isn't everything but respect is."

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**B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS**

Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness)

Source: Change Toronto (2010), pp. 7-14

Changing hiring policies

Organizational hiring policies need to be changed to better reflect the community served. The following actions can be taken to create more inclusive hiring policies:

- Organizations can create policies stating that new positions are filled internally and ensure that internal positions are open to current staff as well as relief staff, peer workers, volunteers and service users.

- Organizations should share innovative policies and processes with other organizations.

- Organizations should ensure that job postings clearly state that volunteer and lived experience counts as experience and remove academic credentials as a mandatory requirement for employment whenever possible.

- Organizations can ensure that applicants are hired based on ability to empathise, understanding of the community, attitude and competency rather than formal education.

- When changes are made to hiring policies, staff need to be informed of the change to the hiring process to ensure they are aware that the process is still fair and transparent, just being made more accessible.

- Organizations can develop targeted or a percentage of positions for community members, while ensuring that these positions are full time, well paid and can lead to advancement within the organization.

- Organizations should evaluate interview process and questions to ensure this process is accessible to community members; this may include practical tests rather than overly formal interviews.
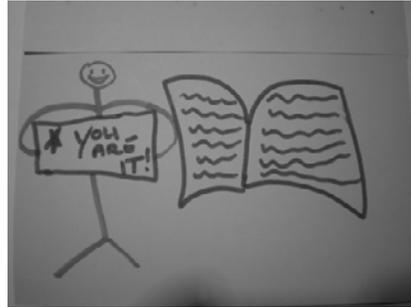
3. Support service-user led initiatives

Peer supports

People who have found work in the sector can support one another as well as those looking for work in the sector. Sharing evidence of success stories can have a positive impact on PWLE and organizations that are showing a reluctance to hire PWLE.

"I was homeless, found a home and life changed. I volunteered and found work helping other consumer survivors. We can do anything we want, if we want it badly enough. It is possible."

- Organizations can share success stories about their experiences hiring PWLE. This can go a long way in reducing stigma and changing hiring policies.

- Peer workers can develop a peer network within agencies and between agencies to provide an opportunity for PWLE to discuss their experiences working within organizations

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- Peers who have found work in the sector can provide training for PWLE who would like to find work in the sector.
- Organizations can survey staff to determine the real number of people with lived experience. This can help to reduce the amount of stigma within an organization to show that much of the stigma that exists is false.
- Agency staff and management with lived experience can provide mentorship support to PWLE hired on as new staff.

Supporting community-led initiatives

Social enterprises and community economic development projects provide work and training opportunities to community members. In order to better support social enterprises and community development:

- The City of Toronto and organizations throughout the city can establish policies requiring the use of social enterprises whenever possible.
- When organizations, community groups and government departments do use social enterprises, they can promote and "brag" about their support of community-led business.
- Organizations should find a way to support new PWLE-led initiatives whenever possible.
- Funders can provide targeted grants for community economic development projects that employ PWLE as leaders.

4. *Address bureaucracy within organizations*

Ensure service users have a decision-making role

When given the opportunity, community members can act as change agents within organizations and in turn can make organizations more inclusive, representative and responsive to the needs of the community. The following recommendations can be implemented to ensure community members are better engaged in decision-making process:

- Organizations can develop advisory groups to increase dialogue between staff and service users.
- Organizations can ensure PWLE sit on hiring committees.
- Individuals can hold agencies accountable for their practices by checking an organization's practices against its mission and values.

> *"We have a role in all of this. We can't wait for them to change their perceptions, we need to put ourselves out there and show them who we really are."*

- Community members can seek access to roles on an organization's board of directors.
- Organizations can invite service users to participate in strategic planning exercises.
- Organizations can ensure that community members have an opportunity to work side-by-side with management to make sure they feel heard.

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- Organizations can invite service users to have a role in program design.

Work with funders

Funders play a huge role in the structure, programming and policies of organizations. In order to better engage funders and impact organizational policies:

- Community groups and individuals can encourage funders to require organizations to hold and report on policy audits.
- Funders can ensure they have PWLE participating in grant development and sitting on selection committees.
- Change Toronto can include funders in this conversation.
- Community groups and individuals can encourage funders to mandate that funded agencies hire a percentage of PWLE on staff and in training opportunities, have PWLE on the board and in other decision-making roles.
- Organizations can work with funders to develop consistent funder reporting and reduce the number of reports required each year.

5. *Develop pre-employment supports*

Pre-employment

Ensuring adequate pre-employment supports are in place is very important in assisting PWLE in finding employment.

- Organizations can work together to better promote supports such as job counselling, interview skills, resume development, life skills, time management, meal planning, clothing and showers.
- Government and organizations can ensure that employment supports are open and accessible and that community members do not feel they have to "beg" for support.

> *"I was very fortunate to have a really good OW worker who helped me get the right kind of support and education. It led directly to my current employment where I have now been for several years."*

Access to education and training

Since so many jobs within the social service sector currently require academic credentials, it is important that PWLE gain increase access to academic programs.

- Universities and Colleges can develop more transparent and clearly worded applications.
- Universities and Colleges should review mandatory requirements for admission.
- Institutions and agencies providing training can link to employment apprenticeships.
- Organizations and community groups can work with Colleges and Universities to develop programming that meets the needs of PWLE, tied with job placements at the end.

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B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS
Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness)
Source: Change Toronto (2010), pp. 7-14

- The private sector can assist in providing skills training and employment.
- Academic institutions and funders can increase the number of bursaries made available to PWLE to increase access to education.
- OW and ODSP can expand funding for formal training opportunities and expand on existing training opportunities to increase options.

6. *Create entry points and training for service users*

   Increase entry points

   Getting a foot in the door can lead to full-time employment opportunities for individuals who would not normally have access to these opportunities.

   - Organizations can establish short term volunteer placements to assist individuals in identifying and developing skills. These placements can be open to even the most marginalized community members.

   - Change Toronto can work to centralize postings for peer, targeted and inclusive job postings.
   - Job fairs can be held specifically for PWLE who are trying to find work in the social service sector.
   - Organizations can establish internship programs for PWLE, similar to student positions, but ideally paid positions and with supports to find work following the internships.
   - Organizations can encourage PWLE to apply for relief positions.

   - Organizations can work together to create rotating internships for PWLE to help people gain experience, increase skills and build networks.

7. *Develop supports for people once hired*

   Supports once hired

   All new employees require supports once hired, however, these support requirements may be different for former service users or those transitioning from social assistance. In order to support new employees:

   - Organizations should review supervision often to ensure adequate and appropriate support is provided and employees feel comfortable having a direct dialogue about their needs.
   - Organizations must provide new employees with a well defined job description.
   - Staff can work with new employees to identify career paths and individualised career plans.
   - Organizations should provide new employees with 2 weeks of orientation rather than a ½ day.

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- Organizations can establish mentorships outside of traditional supervisory roles to support new employees in understanding the organizational culture, reducing exclusion and providing a sounding board.
- Organizations can create exceptions to the waiting periods for benefits.
- Organizations can ensure that wages will cover the cost of childcare, for those working in part-time or casual positions.
- Organizations must work with new employees to ensure their housing will not be jeopardized once they take on full time employment.

8. *Address stigma*

Reduce embedded stigma within organizations

Stigma relating to homelessness, mental health challenges, poverty and marginalization can be found everywhere. While most people working in and with the social service sector are very aware of issues related to stigma, stigma still exists and education is needed to counter it. Stigma within organizations can be addressed by:

- Organization staff can receive regular anti-stigma, diversity and anti-oppression workshops and the dialogue around these issues should be incorporated into ongoing discussions such as staff meetings and forums.

- Organizations can increase opportunities for staff, management, board members and funders to interact with clients and see that clients are people, not statistics.
- Walk my Walk training can be developed for sector staff to provide experiential learning opportunities to better understand the challenges faced by community members.
- Organizations of all sizes should establish human rights committees.
- Everyone working in and with social service agencies, including board members, funders, government representatives, management and frontline staff should receive training on the value of hiring PWLE.
- PWLE can provide training and speak to agency staff, board members and funders about their experiences with homelessness and poverty.
- Toronto Hostels Training Centre can incorporate training led by PWLE about how organizations can reduce embedded stigma and better incorporate PWLE into staffing roles and in decision making.
- Staff can gain training on recovery and potential triggers for PWLE.
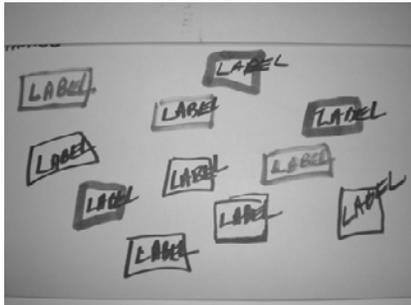
Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness)
Source: Change Toronto (2010), pp. 7-14

Reduce stigma within society

In order to address social stigma, the general public needs to be made aware of the realities of homelessness and poverty. At the same time, more needs to be done to show that people with lived experience of homelessness and poverty are an important part of Toronto's diversity. The following actions can address social stigma:

- PWLE can provide public education through groups such as Voices From the Street and The Dream Team.
- The media can help to provide more of a public voice to PWLE and offer examples of the impacts of stigmatization and discrimination.
- PWLE can make presentations to schools of social work to educate future agency staff.
- PWLE can speak with unions to encourage them to change their advocacy toward supporting PWLE within organizations they are active with.
- Municipalities must eliminate discriminatory bylaws.
- Canada needs to develop a national housing policy.

9. *Address barriers related to social assistance regulations*

Advocate for changes to social assistance

Social assistance regulations create a lot of barriers for PWLE in transitioning to employment. With the system as it currently is, many people feel as if they are being penalized for trying to find employment. In order to address this:

- Individuals and community groups can connect with The People's Blueprint – a community-led review of social assistance in Ontario.
- Academic institutions can conduct an economic study of the cost of clawbacks and other disincentives that make people fear finding employment.
- PWLE and community agencies can speak directly to government agencies about the challenges of social assistance regulations.

"I invited a few people from a community organization over for dinner to have boiled potatoes, or roasted potatoes, or pasta without sauce or sauce without pasta. No one came. Funny that!"

- Everyone can advocate that OW/ODSP stop clawing back people's income until they are earning a liveable wage.
- The government can help clarify and simplify the regulations related to gaining employment while on social assistance.
- Organizations can advocate for a longer transition for rate changes for rent geared to income housing.

- The government should raise the rates of social assistance.
- The government can ensure that people can leave social assistance by raising the minimum wage.

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B2 TOOLS FOR ORGANIZATION CHANGE: LAYING THE FOUNDATIONS

Tool B2.5 Strategies and Actions (for organization change around hiring PWLE of homelessness)

Source: Change Toronto (2010), pp. 7-14

- Media can increase coverage of the true impact of clawbacks.

10. Collectively continue this conversation

Keep this conversation going

Creating more opportunities for PWLE within the social service sector is going to take time and ongoing communication is essential in maintaining momentum. The following actions can be implemented to build on this conversation:

- Everyone who has participated in the discussion can continue to bring these issues up with organization staff, management and boards.

"It's time for new ideas."

- Change Toronto can develop a newsletter and online network to assist in sharing resources, sharing success stories and getting other organizations involved.
- Change Toronto will host networking events to discuss specific actions that can be taken by organizations and to report back on progress.
- Media can assist in promoting the benefits of peer-involvement initiatives.
- Organizations can hold open houses to share resources, information about programming and increase dialogue between organizations throughout the city.
- Organizations can set targets and report back on progress at quarterly follow-up events.
- Organizations can share relevant programs and policies.
- Organizations should include human resources staff in this conversation.
- Organizations can incorporate targets into strategic plans.
- Everyone can learn from organizations already doing this work, including other areas of the sector such as organizations focused on addictions and violence against women.
- Change Toronto and community organizations can develop educational tools and a how-to manual to assist organizations in effectively hiring community members.

Connect to advocacy that already exists

Many networks already exist throughout the city that can both provide input and promote this conversation. Change Toronto will connect with the following groups:

- 25 in 5
- Voices From the Street
- Ontario Human Rights Commission
- Seeds of Hope
- The PWLE Caucus for the Mental Health Commission of Canada's At Home/Chez Soi Toronto site demonstration project
- The Dream Team
- The People's Blueprint

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B3

Tools for Recruitment and Hiring

B3 TOOLS FOR RECRUITMENT AND HIRING
Tool B3.1 Resume and Application Review Process
Source: Working Well Together (2010), p. 160

Resume and Application Review Process

A major aspect in the hiring process, no matter how many individuals have applied, is the resume or application review. While this is time consuming, the process helps to effectively identify the most qualified candidates. Some companies and programs have software that will review resumes or applications, looking for key words, spelling errors, or other preset parameters.

When reviewing resumes or applications from a lived experience population, typical resume review processes will not always be successful in identifying the best candidates. Depending upon the ability to express those experiences on paper, some individuals with extensive expertise in working with their peers through their lived experience could be missed. The review process should be driven by a plan to identify the best candidates for an interview. This might include:

- Establish what is most important on the application or resume and give weighted scores in those areas.
- Look through the resume or application for signs of lived experiences that will help fulfill the desired skills and qualities as outlined in the job description.
- Use a team approach in reviewing resumes and applications. This will help ensure multiple views of the application and the strengths and skills of the lived experience applicant.
- Use individuals from the populations to be served, such as the parent of an adult with mental health service needs, or a youth receiving services as a part of the review team. If there are none, borrow one from another similar program.
- View and score organizational affiliations as a professional affiliation.
- Count lived experience as a work experience.
- Count volunteer experience as work history.

Flexibility is the key for using an application or resume review process if the intent is to identify the candidates for interviews out of a pool or applications.

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Appendix B: List of Tools from Other Sources

B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.2 Sample Resume or Application Review Form

Source: Working Well Together (2010), p. 163

Sample Resume or Application Review Form

Last Name	First Initial	Selected for Interview	Qualified candidate	Strong skills in majority of job requirements	Does not meet minimum job requirements	Experience not relevant	Lacks depth of experience	Lacks Supervisory Experience	Overall good candidate but did not rank in top selection	Comments

METCALF FOUNDATION **Employing Staff with Lived Experience** ■ **A Toolkit for Shelter Management and Human Resources Staff (DRAFT V2)**

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Appendix B: List of Tools from Other Sources

B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.3 Resume or Application Review Sheet (for lived experience designated roles)

Source: Working Well Together (2010), pp. 164-165

Resume or Application Review Sheet

Applicant is a:	
• Parent of a child or youth served by the public mental health system	
• Family member of an adult with mental health needs.	
• Someone who has received mental health services for a serious mental illness.	
• Person with a personal experience with recovery from a psychiatric condition required	
Experience indicates:	
• Knowledge about program guidelines, including the rules and regulations affecting the individuals served	
• Knowledge of the recovery process and the ability to facilitate recovery using established standardized mental health processes	
• Knowledge and skill to teach and engage in basic problem solving strategies to support individuals in self-directed recovery	
• Knowledge of the signs and symptoms of mental illness and the ability to assist in addressing symptoms using strategies such as positive self-talk	
• Knowledge and skill sufficient to use community resources necessary for independent living and ability to teach those skills to other individuals with mental illness	
• Knowledge of how to establish and sustain self-help (mutual support) and educational groups	
• Ability to evaluate needs, increase skills, complete intake functions, provide education and support, facilitate communication and complete documentation	
• Ability to provide advocacy, support and referral service to those persons assigned to their caseload	
• Ability to provide advocacy and liaison services, as well as in-home support services, to individuals in program to ensure that they are properly supported through the process	
• Ability to work directly with persons in need and their families or others in the community in order to promote, strengthen and to prevent harm.	

• Ability to assist and empower persons receiving services by identifying a main concern, developing strength based independent living plans that includes a measurable goal and objectives, and carrying out the independent living plans	
• Ability to provide support services; serves as an advocate; provide information and support in a variety of settings; performs a wide range of tasks to support living own lives and directing own recovery and wellness process	
• Ability to serve as a role model to peers	
• Ability to educate persons receiving services about self-help techniques and self-help group process	
• Ability to teach peers effective coping strategies, sometimes based on personal experience	
• Ability to assist peers in clarifying goals for rehabilitation and recovery	
• Ability to help persons with a similar lived experience to develop support systems	
Lived Experience related Certifications (List):	
•	
•	
•	
Score	
Comments:	

Reviewer:	
Date:	
Signature:	

B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health)
Source: Working Well Together (2010), pp.182-187

Values and Skills

The following matrix reflects summarized outcomes of a preliminary consensus-based dialogue with peer provider and, managers and administrators representing peer providers in age-specific Systems of Care (Children's, Transition-Age Youth, Adult and Older Adult) in the County of Los Angeles - Department of Mental Health in 2012-2013.These values and skills reflect *generalized values and skills across age-specific systems*. (Further work by Los Angeles County - Department of Mental Health, under the Workforce, Education and Training Division and the Empowerment and Advocacy Division, can be found in the County of Los Angeles - Department of Mental Health *Peer Specialist Training and Core Competencies: Summary of Findings* report.)

Category: VALUES

Relationship is primary

- Reciprocal
- Non-judgmental
- Trusting
- Connectedness
- Egalitarian
- Basis of Equal Human Rights
- The primary goal of a Peer Specialist is to establish an unconditional acceptance (loving) and supportive, trusting relationship of equals with people.

Cultural Awareness (client culture, race, ethnicity, co-occurring, age, sexual orientation, gender, gender identification, etc.)

- Understanding of and respect (for specific cultures being served)
- Limitlessness of the potential and ability of people
- Developmental Stages
- Broadly Inclusive of Multiple Identities of People
  - Aging processes
  - Race
  - Sexual orientation
  - Gender
  - Gender identification
  - Ethnicity
  - Religion
  - Spirituality
  - Mental, Emotional and Physical Different Abilities
- Inclusive of multiple service needs:
  - Co-Occurring
  - Medical Care
  - MH Care
  - Trauma
- Understanding of peer interventions that work best with different demographic groups.

Life experience is crucial

- Significance of experience

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B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health)

Source: Working Well Together (2010), pp.182-187

- Relate-ability to those supported
- Values as Role Model
- At least a year of self-help support group experience
- Experience receiving/participating in best practice peer services
- Previous job experience essential

Able to share with and connect with others as Peers

- Personal connectedness
  - Through language
  - Listening
- Ability to relate to person via specific life experiences
  - Grieving
  - Sharing of story
- Starting and being present according to where the client/family is at
- Ability to support a person in setting and achieving his/her own goals, (not the Peer Specialist's or someone else's goals)

Principles of:

- Hope
- Dignity And Respect
- Empowerment
- Self-Advocacy
- Personal Responsibility
- Support
- Self-Determination
- Empathy
- "Peerness"
- Recovery is possible for All
- Everyone has a unique path.

Category: SKILLS

Communication

- Literacy
- Oral/Written
  - Documentation
  - Participating in Tx Teams and
  - Advocacy
  - Facilitation *[Note: Facilitation is considered less than best practice by some and undermining of peer relationships.]*
- Listening-Actively and Reflective (empathize)
- Able to tell Story in service of the consumer, knowing when it is appropriate and when it is not
- Supportive Communication Styles:
  - Use of "I" perspective
  - Avoiding labels
  - Non-judgmental
  - Able to explain concepts

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B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health)

Source: Working Well Together (2010), pp.182-187

- - - Imparts safety
    - Eye and Body Language Aware
    - Conflict Resolution
  - Specialized
    - Computer
    - Knowledge of Specific Local Resources

Use of Language/Jargon

- Recovery
- Resiliency
- Use of Non-specialized or layperson language:
  - Words the person uses
  - Cultural translations or interpretations
  - Words not clinically based.
- Knowledge of professional language and ability to explain and interpret between peer language and professional language.

Demonstrate key principles:

- Hope
- Respect
- Empowerment
- Empathy
- Self-Advocacy
- "Peerness"
- Wellness/Self Care
- Strength-based
- Love

Able to develop rapport and demonstrate good interpersonal skills

- Bridge-builder/ Team player
- Meet people where they are at
- Positive Respect for person/family
  - Validation
  - Welcoming
  - Approachable
  - Shows caring and unconditional love and support
- Able to disclose personally / tell story to meet others' needs
- Able to deliver attention, affection and approval

Cultural Awareness

- Use of cultural resources for people - that conveys a positive, high regard for person/family cultural needs and identity.
- Work / Solution focuses reflect cultural sensitivity and concepts based upon:
  - Age
  - Race
  - Gender
  - Gender identity

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B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health)

Source: Working Well Together (2010), pp.182-187

- Sexual orientation
- Ethnicity
- Religion
- Spirituality
- Mental, Emotional and Physical Different Abilities
- Co-Occurring
- Medical Care
- Services that are linguistically and culturally competent
  - Bi-lingual staff
  - Translation for person/family's primary language
  - Diversity of staff

Knowledge of Policies

- County/Agency Policies and Procedures
- Code of Conduct
- Code of Ethics
- Accountability
- Understanding of Scope of Work:
  - Limitations
  - When to ask for help
  - How to use Supervision
  - How to advocate for self within professional settings

Knowledge of Systems

- Basic Mental Health
- Education
- Social Services
- Protective Services
- Developmental Service System
- Employment
- Justice
- Medical

Knowledge of Key Concepts and Principles

- Recovery
- Resiliency
- Human Rights
- Peer best practices
  - Self-help support groups
  - 12 Step meetings
  - Non-12 Step addiction self-help support groups
  - WRAP
  - Sponsoring and mentoring
  - Developing a peer support network outside of the mental health system
  - Community integration
- Strength based
- Trauma

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- Developmental / Identity Stages
- Stages of Change
- Legal /Ethical Issues
- Holistic care

Outreach and Collaboration; Resource & Referral

- Identify and use community outreach sites (informal and formal)
- Ability to network effectively and collaboratively with other professionals and organizations.
- Identify and Link with Resources (Be a connector)
  - Community (faith communities, social support groups)
  - Mental Health
  - Housing
  - Medical
  - Legal
- Promote respect and stigma reduction

Education/ Support for Individual , Family, and/or Parent/ Caregiver

- Provide "safe space"
  - Physical space for emotional expression
  - Affirming of grieving and other traumatic experiences.
- Provide targeted education for multiple health issues:
  - Health 101
  - Lifestyle Changes
  - Self-Help
  - Support Groups
  - Basic Medical
  - Sexuality
  - Trauma
  - Healing Relationships
  - The Journey of … (recovery, discovery, etc.)
  - Basic Child development / expected milestones

Basic Skill Set

- Maintaining Safety
  - Reading body language
  - Recognizing verbal cues
  - Maintaining emotional boundaries in supporting people with trauma
  - Negotiation
- Knowing Scope of Practice
- Documentation
- Time Management
- Avoiding power struggles
- Recognizing when I am triggered and having a process to resolve it without acting out
- Nonviolent Communication
- Educating about confidentiality, rights
- Providing resource and referral
- Assessing person/family strengths and challenges

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B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.4 Values and Skills (recommended qualifications for peer positions in mental health)
Source: Working Well Together (2010), pp.182-187

- Assist in developing self-directed planning for people
  - Self-Help Support Groups
  - 12 Step Groups
  - Recovery International
  - Non-12 Step addiction self-help support groups
  - Goal Setting
  - WRAP
  - Advanced Directives
  - Crisis Planning

Participate in Professional Development Activities and Training:

- Conceptual and Operational Activities and Training
- Peer Specific:
  - Values of Peer Support
  - Cultural Competency
  - Diversity
  - Self-Care/ self-advocacy / assertiveness
  - Self-help Support Groups
  - Mentoring
  - Support Systems for self, Self-Advocacy
  - Whole Health Wellness
  - WRAP
  - Mental Health Awareness [for laypeople] (i.e. MH 1st Aid)
- Orientation topics:
  - Policies and Procedures
  - Code of Conduct
  - Ethics
  - Accommodations/ADA
  - Family Leave Act and other legislation that provides support for employees.
- Specific Mental Health topics:
  - Co-Occurring Disorders
  - Conflict Resolution / De-Escalation Techniques
  - Trauma
  - Effects of Drugs
  - Motivational Interviewing
  - Mental Health First Aid
  - Grief/Loss
  - Expected emotional / psychosocial development of infants and children

Participate in Job Development Activities & Performance

- Regular 1:1 Strength based Supervision
- Review of job expectations and progress
- Participation in provider teams.
- Peer team review of ongoing support and training needs
- Celebration of peers successes related to mission of agency/ org.
- Dedicated leadership development activities.

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B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.5 Applicant Selection Chart and Competency Profile

Source: Working Well Together (2010), p. 188

Applicant Selection Chart and Competency Profile

Develop the desired traits or qualities that would be evidenced by the ideal candidate. List these in the right hand column and use as a guide in developing questions and selecting candidates for the lived experience position.

Area	Indicators that Show Competency
1. Skills:	•
2. Experience:	•
3. Knowledge:	•
4. Competencies:	•
5. Work Values:	•
6. Personality Traits:	•
7. Presentation:	•
8. Education or Training:	•
9. Capacity to Perform:	•
10. Other:	•

B3 TOOLS FOR RECRUITMENT AND HIRING
Tool B3.6 Candidate Selection Scoring Sheet
Source: Working Well Togetherer (2010), p. 189

Candidate Selection Scoring Sheet

Use the following, after defining evidence, to assign a score in each area to assist in identifying the best candidates.

Area	Desired Indicators (List indicators that would show competency within the area)	Total Points of a Possible 10
1. Skills:	•	
2. Experience:	•	
3. Knowledge:	•	
4. Competencies:	•	
5. Work Values:	•	
6. Personality Traits:	•	
7. Presentation:	•	
8. Education or Training:	•	
9. Capacity to Perform:	•	
10. Other:	•	

NOTES:

Appendix B: List of Tools from Other Sources

B3 TOOLS FOR RECRUITMENT AND HIRING
Tool B3.7 How to Write an Inclusive Job Posting
Source: Hire for Talent (2017), Section 4.3, PDF Version, pp.1-3

Tool #4: Recruitment   www.hirefortalent.ca

4.3 How to Write an Inclusive Job Posting

First and foremost, you must have an updated job description: Identify the essential functions of the job. What are the essential requirements? What are the needed core competencies to perform this job?

Be inclusive.

When writing the job posting, the details used to describe the job requirements should not exclude someone with a disability. Listing physical demands that are not essential to the job, could automatically exclude someone with a disability from the hiring process.

For example: Employers sometimes indicate physical demands that are not actually essential for the job, such as: repetitive movement of hands and fingers—typing and/or writing; occasional standing, walking, stooping, kneeling or crouching; reaching with hands and arms; talking and hearing; and the ability to lift and carry up to 20 lbs. When these are written, and they are not essential, the employer will not access the untapped labour pool of skilled workers.

Language can create barriers for recruiting and hiring the right talent.

An inclusive job posting states alternative expertise or experience. This encourages candidates with different abilities to apply for the job. Qualifications and requirements must reflect inclusiveness and be result oriented.

Sample Qualifications and Requirements.

Language could create barrier to employment	Language is results oriented
10+ years' experience in medical administration in a medical specialist's office.	Experience working as a medical administrator, including experience managing patient appointments and requests, and communication with healthcare partners.

4.3 How to Write an Inclusive Job Posting   1

METCALF FOUNDATION

B3 TOOLS FOR RECRUITMENT AND HIRING
Tool B3.7 How to Write an Inclusive Job Posting
Source: Hire for Talent (2017), Section 4.3, PDF Version, pp.1-3

Valid driver's license required.	The ability to travel and provide own transportation.
Three years' experience as a tax auditor.	Experience in tax auditing involving a variety of industries, including several complex audits.

Use plain language.

Keep things simple and to the point; lay out information as clearly as possible. Call on your local service provider to get a professional opinion to ensure requested qualifications are not discriminatory.

For example: State clearly and simply the conditions of employment, including any potential flexibility regarding work hours. Clearly indicate whether the position is full time, part time, casual or contractual. Mention salary and benefits as appropriate.

Show where you stand.

Include a statement about your company's commitment to equal employment opportunity.

For example: Our company values the diversity of the people it hires and serves. Diversity at our company means fostering a workplace in which individual differences are recognized, appreciated, respected and responded to in ways that fully develop and utilize each person's talents and strengths.

Provide contact details.

Provide details of a contact person who is able to answer questions about the essential job requirements. The contact person should also be aware of the company's diversity and inclusion policy.

For example: For more information about our **Canadian Workplace Diversity Initiative, including disability accommodation**, please contact *careerinquiries@ourCompany.com* or call **(123) 456-7890.**

Be accessible.

Ensure your inclusive job offer is distributed in various formats, so that it can reach as many candidates as possible, including the untapped pool of skilled workers.

For example: Alternative formats include HTML and Microsoft Word, large print, text transcripts of visual information, and accessible electronic formats compatible with screen readers.

Be easy to reach.

Provide several different ways to receive candidates' applications.

For example: Accept applications by email, fax, teletype writer (TTY), video relay service (VRS), regular mail, or by inviting candidates to submit applications online via your company's accessible website.

B3 TOOLS FOR RECRUITMENT AND HIRING

Tool B3.7 How to Write an Inclusive Job Posting

Source: Hire for Talent (2017), Section 4.3, PDF Version, pp.1-3

Take the Challenge!

True or False

An inclusive job posting always contains a statement about diversity and inclusion.

True. Inclusive job postings state the company's commitment to equal employment opportunity.

Sources:

[1] *Checklist for an inclusive recruitment process, Disability Services Commission, Government of Western Australia. Extracted from the website:* www.disability.wa.gov.au

[2] *Conference Board of Canada, Tapping the Talents of People with Disabilities: A Guide for Employers, Ruth Wright in partnership with the Government of Ontario. 2001.*

Disclaimer:

Hire for Talent has made every effort to use the most respectful words possible while writing these materials. We realize, however, that the most appropriate terminology may change over time. We developed these materials with the intent to respect the dignity and inherent rights of all individuals.

4.3 How to Write an Inclusive Job Posting   3

B4

Tools for Onboarding

B4 TOOLS FOR ONBOARDING

Tool B4.1 Components of an Orientation for Lived Experience Staff
Source: Working Well Together (2010), pp. 205-207

Components of an Orientation for Lived Experience Staff

Orientation Area	Potential Resources
Organization or program background	
• History of program and organization	
• Mission and vision of the organization	
• Organizational philosophy or guiding values	
People within the organization or program	
• Administrators	
• Line staff	
• Support staff	
Support information	
• ADA (Americans with Disabilities Act) coordinator	
• Affirmative action	
• Administrator of the benefits program	
• Who handles payroll	
• Ombudsman or special liaison for complaints	
Organizational structure	
• Structure of responsibility	
– Who reports to whom	
– Who's responsible for what areas of work	
– Who makes things happen	
• Decision-making structure	
– Who participates in what decisions	
– When various people can act independently and when they need to check with someone else	
– Who shares in hiring	
• Grievance	
– Conflict resolution	
– Other decisions	
• Governance structure	
– Role, structure and membership of the Board	
– Actual powers of the director and other administrators	

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B4 TOOLS FOR ONBOARDING

Tool B4.1 Components of an Orientation for Lived Experience Staff
Source: Working Well Together (2010), pp. 205-207

– Parts that others play in the governance of the organization	
● Physical/geographical structure	
– Size and geography of the organization	
– Where people's desks are located	
– Where various sites are located in different towns and what happens at each location	
Logistics and day-to-day routine	
● Equipment and in office technology - copiers, computers, phone systems, CD and DVD players, VCRs, etc., and instructions for and restrictions on their use	
● Materials and supplies - location; the routine for ordering; how to access to what is needed;	
● Time issues such as expected work hours; payday; arrival, lunch, and quitting time; extra work times	
● Benefits such as vacation, personal leave or sick day; how to use health insurance; comp time; travel reimbursements; etc.	
● Office routines such as who opens and closes the workspace, where restroom keys are, who answers which phones, security procedures	
● Other things that contribute to the office culture and environment such as good places to eat lunch, where to park, soda machines, spring water, coffee, food rotation for staff meeting.	
Supervision	
● Who supervises who	
● How supervision will occur	
● Variations to supervision	
Policies and procedures	
● Organizational culture and etiquette	
– Dress	
– Work expectations	
– Smoking	
– Food	
– Children in the workplace	

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B4 TOOLS FOR ONBOARDING

Tool B4.1 Components of an Orientation for Lived Experience Staff

Source: Working Well Together (2010), pp. 205-207

– Work relationships	
Target population	
• How they are identified	
• Demographics	
• Characteristics	
• Program eligibility	
• Culture	
• Strengths and needs	
• Interaction between the program and the target population	
• Introduction to the community at large	
• Program partners	
• Community resources	
Introduction to the position	
• Methods or strategies for performing job	
• What the job actually looks like day to day	
• Unstated job requirements	
• Trial period	
• Expectations	
• Personal improvement	
• Accommodations	
• WRAP	
• Self-management and strategies for wellness	
• Mental health first aid	
• Mandated reporting (i.e. child abuse, spouse abuse, etc.)	
Performance Evaluation	
• Purpose	
• Who will be doing the valuation	
• When it will occur	
• How the information will be used	
• Employee role in Performance Evaluations	

Axis Group I, LLC 2013

B4 TOOLS FOR ONBOARDING

Tool B4.1 Components of an Orientation for Lived Experience Staff

B4 TOOLS FOR ONBOARDING
Tool B4.2 Tips for Developing Orientation Programs
Source: Working Well Together (2010), pp. 208-209

Tips for Developing Orientation Programs

- **Clarify Outcomes:** Determine if the orientation is meant to introduce the new staff member to others in the organization and assist them in understanding the program or is it expected to enable them to start right in on her job?

- **Build the orientation around the outcomes:** The purpose should drive the orientation process and assist in determining what should be included and if it must be done all at once, periodically, or over a progressive period.

- **Choose the format:** The *format* of an orientation is the medium through which material is presented, such as face-to-face, webinar, print, a video, an audiotape, or combine any number of these and other formats.

- **Encourage as much personal contact as possible:** Bring in other staff to explain different components of the program to begin introducing them to others and help them identify with their other team members.

- **Remember that different people learn differently:** Some people take in information best by seeing, others by hearing, still others by touching and manipulating. Some tend to look at the big picture, others at the details; some prefer a step-by-step approach, others a more diverse and intuitive one. It's important to be aware of learning styles and present in different ways.

- **Hit the Highlights, Skip the Fine Print**: Identify the most important things new employees need to know, and divide the training time accordingly. An exhaustive approach that covers every footnote in the HR manual isn't necessary, and may actually wind up confusing new hires.

- **Give New Hires a Cheat Sheet:** If possible, prepare a binder with all written training materials and give it to new hires before the orientation session. This will give them a chance to begin familiarizing themselves with the organization's policies and procedures in advance. A hang up sheet of important numbers, critical information, local restaurants, or other helpful information will assist them as well.

- **Decide who will conduct or orchestrate the orientation:** Select one person to orchestrate the orientation and have them serve as the lead, even if several staff are involved in the presentations.

- **Decide on the duration of the orientation:** Estimate how much time is needed to run the orientation and designate an orientation period at the beginning of a staff member's employment so that they understand and know what to expect within the orientation period. An orientation period may last as little as a few days or a week, or as much as three or four months. If it's short, it

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B4 TOOLS FOR ONBOARDING

Tool B4.2 Tips for Developing Orientation Programs
Source: Working Well Together (2010), pp. 208-209

could be pure orientation time, during which the staff member does nothing else, or it could fit in around a work schedule. During this time, the new staff member will get some direct information, and also spend a good deal of time meeting with other staff members, Board members, participants, people from other organizations, and others who can cast light on her job and its context. An advantage of a long orientation period is that it gives people the time to absorb what is likely a considerable amount of information.

- **Evaluate the orientation each time:** Evaluation will help make the orientation more effective and improve staff capacity to be successful in their position. An evaluation should include feedback from those evaluated, and can be built right into the orientation itself.

- **Create some sort of marker for the end of the orientation or orientation period:** A small party, an official welcome to the staff, the presentation of keys or some other celebration indicates an official end to the orientation. This kind of closure can help to facilitate the transition from "new " to "regular" staff member.

Adapted from: Community Tool Box: http://ctb.ku.edu

B4 TOOLS FOR ONBOARDING

Tool B4.3 Initial Orientation/Training and Developing Individual Goal Plans with Peers
Source: SSCH (2017), pp. 20-21

Special considerations when hiring peers include:

- Informing peers of the wage during the interview, in order to allow them to research any impact on income entitlements they may be receiving.
- Informing peers if the position is time-limited (contract), from the point of posting the job right through to selection and contract.
- Needing to potentially waive police checks with peers who may have had criminal activity in their past if the program supports participants who may have criminal histories.

Initial Orientation/Training and Developing Individual Goal Plans with Peers

Once your peers are hired, getting them oriented and off to a positive start is important. Orientation should include the relevant information about the organization, including a review of critical policies. It should also include program-specific information. A best practice is to have all peers attend a general orientation together that is co-facilitated by a more experienced peer, and then break off into program orientation. This allows new peers to meet right away and to start to build relationships with each other. It is further suggested that peers job shadow other peers or an identified non-peer staff person as an integral part of orientation, to support their transition into their work duties.

To the right is a sample table of contents from SSCH's PWP that also forms the basis of an orientation training agenda that you can adapt for your use.

Welcome

Overview of St. Stephen's Community House
    Mission Statement
    Vision and Guiding Principles
    Our Dream
    Action Statement

Working as a Peer in the Housing and Homeless Department

General Information
    Hiring Process
    Supervision
    Rights
    Responsibilities
    Recognition

Participant Expectations
    Participation
    Absenteeism
    Dismissal
    Serious Occurrence Reports

St. Stephen's Community House Policies
    Code of Conduct
    Confidentiality/Disclosures and Ethics
    Equity Policy
    Lone Worker Policy
    Social Media Policy
    Check-in/out Procedures
    Working for an External Agency

Ending Your Peer Commitment

Emergency Information

B4 TOOLS FOR ONBOARDING

Tool B4.3 Initial Orientation/Training and Developing Individual Goal Plans with Peers
Source: SSCH (2017), pp. 20-21

In addition to thorough orientation, developing individualized goals plans with new peers will support the achievement of outcomes for both the peers and the organization within timeframes as identified by the peer, program and/or organization. Remember that this ties back to the broader outcomes your organization is seeking having peer programming, and the decisions you made as a result about the length of time peers should stay in different jobs/roles. A sample goal plan is seen below:

Peer Leader Personal Development Plan

For_____   Position_____

From_____   To_____

Date	
What skills do you need to develop?	
How will you develop them?	
By when?	
Update	

B5

Tools for During Employment and Career Advancement

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.1 Accommodating Mental Illness in the Workplace
Source: Hire for Talent (2017), section 12.5, PDF version, pp. 1-4

Tool# 12: Mental Health and the Workplace   www.hirefortalent.ca

12.5 Accommodating Mental Illness in the Workplace

Mood and anxiety disorders can affect a person's ability to work productively and to be effective in their job. While some employees may require a short- or long-term disability leave, the majority are able to continue working with some adjustments or accommodations in how or where they work.

There are many benefits to accommodating an employee with a mental illness to keep working:

Employee Benefits:

- A daily routine and sense of purpose
- Social connection within the workplace
- Income

Employer Benefits:

- Business continuity
- Goodwill with the employee that can lead to stronger engagement and trust
- The goodwill ripple effect with other employees who see that their colleague is supported

Duty to Inquire and Duty to Accommodate

There are two important legal requirements to be aware of when it comes to mental illness and the workplace:

1. The duty to inquire.

Managers who think that an employee may be struggling with a mental health challenge have a legal duty to inquire. Simply put, if you think there is a mental illness you must ask the employee.

2. The duty to accommodate.

All employers in Canada are required by law to accommodate an employee with a disability, up to the point of undue hardship. This includes a mental illness such as a mood or anxiety disorder or addiction.

12.5 Accommodating Mental Illness in the Workplace   1

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.1 Accommodating Mental Illness in the Workplace
Source: Hire for Talent (2017), section 12.5, PDF version, pp. 1-4

Myths About Accommodations

Myth #1: A person with mental illness is incapable of working.

When we think about a person who has a mental illness, we often believe that they are unable to work, and the only solutions are for them to take a disability leave or quit their job. The reality is that most people experiencing a mental health challenge can continue to work with some simple adjustments. In fact, there are likely employees of yours right now who have a mental illness and are working – you just don't know about it.

Myth #2: Accommodating a person with a mental health challenge is hard to do.

It is a common misconception that providing an accommodation for a person with a mental health challenge is hard. An accommodation is really just an adjustment – often temporary - that can help an employee to continue doing their job and contributing to the work of your organization. Usually, the best place to start is talking to your employee to find out what elements of their job they might be struggling with and coming up with solutions that help remove those struggles.

Common Accommodations

According to Mood and Anxiety Disorders Canada, of those who are currently working or have worked since being diagnosed with a mental illness, 50% reported requiring an accommodation or adjustment in the workplace.

Examples of workplace supports, accommodations, or adjustments for mental health challenges include:

Symptom or Challenge	Accommodation
Tardiness	A later start and finish time
Absenteeism; time away for medical appointments	A flexible work schedule that may include work from home options, split days off, or a compressed work week
Agitation from noise	A quieter workspace/location
Setting unrealistic goals; poor time management; challenges with interpersonal relationships	Coaching from the manager; more frequent check ins and one-to-one meetings
Difficulty finishing tasks	Modifying or adjusting some job duties, reassigning some work

Accommodating mental health challenges may require time and patience from both the manager and the employee. The first adjustment that you try might not work. That's OK, keep trying.

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.1 Accommodating Mental Illness in the Workplace
Source: Hire for Talent (2017), section 12.5, PDF version, pp. 1-4

Always Ask the Expert: Engage the employee in the accommodation discussion.

The most important thing to know about accommodating an employee with a mental health challenge is this: you are not the expert. Nor should you be – you are not a trained healthcare provider. Ask the employee what they think will work for them. If it's a new illness they might not know. If it's a pre-existing or recurring illness, they will likely know what will work and what won't work. Either way, it's essential to engage the person with the illness in the conversation. And always ask your employee to talk with their doctor about accommodations and treatments.

Undue Hardship

It is important to note that while there is a legal requirement to accommodate a person with a mental illness, it is only up to the point of undue hardship. That means that if you are a small business and the accommodation would have a significant impact on your ability to continue to operate your business, you do not need to make the accommodation.

The planning for an accommodation is a joining conversation where both sides – employer and employee – may need to meet somewhere in the middle.

The Accommodation Process

Chances are that you and your employee will need help with the accommodation process. Depending on the size of your organization, you will have either lots of resources available to you or not many. Here are some suggestions to help you either way.

What to do if you don't have a Human Resources department or Employee and Family Assistance Program:

- Contact subject matter experts in the community such as your local Canadian Mental Health Association Chapter and ask for help.

- Do some research online – there are lots of free resources that can provide you with some relevant information like the Mental Health Commission of Canada or Workplace Strategies for Mental Health.

- Ask another manager in your organization for suggestions as to how they have supported their employees in the past (remember to maintain confidentiality!).

- If you belong to an industry association, ask other members if they have some advice.

What to do if you do have a Human Resources department or Employee and Family Assistance Program:

- Ask your HR Consultant for guidance with the accommodation process.

- Use your employee and family assistance provider as a resource to:

    a. Help you as a manager to support your employee; and

    b. Provide supports to your employee.

Appendix B: List of Tools from Other Sources

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.1 Accommodating Mental Illness in the Workplace
Source: Hire for Talent (2017), section 12.5, PDF version, pp. 1-4

What to Tell Other Employees

Confidentiality and trust between the manager and employee are essential. However, when you accommodate an employee with changes like a flexible work schedule or modified tasks, other employees will be curious and may make assumptions. Anticipate this and talk with the employee about how to address this as part of the accommodation plan.

The employee is not required to disclose a medical diagnosis or any personal information relating to their illness. It is up to the employee to decide how much or how little they share with their colleagues.

Sources:

[1] Government of Canada. (2015, June 3). Mood and anxiety disorders in Canada. Retrieved from Mood and anxiety disorders in Canada - Canada.ca

Disclaimer:

Hire for Talent has made every effort to use the most respectful words possible while writing these materials. We realize, however, that the most appropriate terminology may change over time. We developed these materials with the intent to respect the dignity and inherent rights of all individuals.

12.5 Accommodating Mental Illness in the Workplace   4

Accommodations Tools

Assessing Necessary Accommodations

People with mental health impairments may develop some of the limitations discussed below, but seldom develop all of them. Also, the degree of limitation will vary among individuals. Be aware that not all people with mental health impairments will need accommodations to perform their jobs and many others may only need a few accommodations. The following is only a sample of the possibilities available. Numerous other accommodation solutions may exist.

Questions to Consider:

- What limitations is the employee with mental health impairment experiencing?

- How do these limitations affect the employee and the employee's job performance?

- What specific job tasks are problematic as a result of these limitations?

- What accommodations are available to reduce or eliminate these problems? Are all possible resources being used to determine possible accommodations?

- Has the employee with mental health impairment been consulted regarding possible accommodations?

- Once accommodations are in place, would it be useful to meet with the employee with a mental health impairment to evaluate the effectiveness of the accommodations and to determine whether additional accommodations are needed?

- Do supervisory personnel and employees need training regarding mental health impairments?

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.3 Sample Accommodations
Source: Working Well Together (2010), pp. 46-49

Sample Accommodations

Below are examples of accommodations that may assist individuals with lived experience to more effectively performing their jobs. The list below does not include all possible accommodations, but it is a good starting point and provides some of the most effective and frequently used workplace accommodations.

Attendance:

Allow flexible work environment:

- Flexible scheduling
- Modified break schedule
- Leave for counseling
- Leaving for meeting and appointments for child/youth
- Work from home/Flexi-place

Concentration:

Reduce distractions in the work area:

- Provide space enclosures, sound absorption panels, or a private office
- Allow for use of white noise or environmental sound machines
- Allow the employee to play soothing music using an ear bud and computer or music player
- Plan for uninterrupted work time
- Purchase organizers to reduce clutter
- Increase natural lighting or provide full spectrum lighting

Allow flexible work environment:

- Flexible scheduling
- Modified break schedule
- Leave for counseling
- Work from home/Flexi-place
- Divide large assignments into smaller tasks and goals
- Use auditory or written cues as appropriate

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.3 Sample Accommodations

Source: Working Well Together (2010), pp. 46-49

- Restructure job to include only essential functions

- Provide memory aids such as schedulers, organizers, or email applications

Emotions:

- Encourage the use of stress management techniques to deal with frustration

- Allow the presence of a support animal

- Allow telephone calls during work hours to doctors and others for needed support

- Allow flexible breaks

- Refer to employee assistance program (EAP)

Fatigue:

Allow flexible work environment:

- Flexible scheduling

- Modified break schedule

- Leave for counseling

- Work from home/Flexi-place

- Provide a goal-oriented workload

- Reduce or eliminate physical exertion and workplace stress

- Implement ergonomic workstation design

Memory:

- Allow use of job coach

- Provide mentor

- Provide minutes of meetings and trainings

- Use auditory or written cues as appropriate

- Allow additional training time

- Provide written checklists

- Use a color coding scheme to prioritize tasks

- Use notebooks, planners, or sticky notes to record information

- Provide labels or bulletin board cues to assist in location of items

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.3 Sample Accommodations

Source: Working Well Together (2010), pp. 46-49

Organization:

- Use daily, weekly, and monthly task lists
- Use calendar with automated reminders to highlight meetings and deadlines
- Use electronic organizers or mobile devices
- Divide large assignments into smaller tasks and goals
- Use a color coding scheme to prioritize tasks

Panic Attacks:

- Allow the employee to take a break and go to a place where s/he feels comfortable to use relaxation techniques or contact a support person
- Identify and remove environmental triggers such as particular smells or noises
- Allow the presence of a support animal

Sleep Disturbances:

- Allow for a flexible start time
- Combine regularly scheduled short breaks into one longer break
- Provide a place for the employee to rest during break
- Allow the employee to work one consistent schedule
- Provide a device such as a Doze Alert or other alarms to keep the employee alert
- Provide work areas with sunlight or other natural lighting

Stress:

- Refer to counseling and EAP
- Allow telephone calls during work hours to doctors and others for needed support
- Allow the presence of a support animal

Allow flexible work environment:

- Flexible scheduling
- Modified break schedule
- Leave for counseling
- Work from home/Flexi-place

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.3 Sample Accommodations

Source: Working Well Together (2010), pp. 46-49

Coworker Interaction:

- Encourage the employee to walk away from frustrating situations and confrontations

- Provide partitions or closed doors to allow for privacy

- Provide disability awareness training to coworkers and supervisors

Adapted from: Accommodation Ideas for Depression, http://askjan.org/media/depr.htm

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.4 Questions to Ask About Accommodations and Supports

Source: Working Well Together (2010), pp. 50-51

Questions to Ask About Accommodations and Supports

Below are several questions you might ask a person with lived experience to encourage a discussion and exploration of accommodations and supports that might be necessary to help them be successful in their position. This should be done in a private, one on one, with someone who is sensitive to issues related to employment for persons with mental health issues.

Remember, they may be hesitant to discuss these issues for fear of being fired or not getting a promotion or position. It is the responsibility of the program to ensure this is a safe place for persons with lived experience to talk about how those experiences can and will impact their work and what can be done to help them be successful.

General

- What limitations do you feel you might experience in the workplace?

- How might these limitations affect your job performance?

- What specific job tasks are problematic as a result of these limitations?

- What accommodations do you feel would reduce or eliminate these problems?

- Are there other support resources being used that we should be aware of?

- Do you feel that supervisory personnel and other employees need training regarding mental health impairments?

Flexibility

- Do you anticipate any problems with the work hours you have been assigned?

- Is it possible that you would have difficulties performing your job under the current arrangement?

- Do you anticipate a need to miss work regularly due to appointments, meetings at schools, or other activities related to you or your child?

Physical Space

- Is there anything we can do to make your work environment more productive? (Such as less lighting, less sound, private space for work, etc.)

- Is there anything you will need to assist you in using the equipment and software in the office?

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.4 Questions to Ask About Accommodations and Supports

Source: Working Well Together (2010), pp. 50-51

Supervision

- What type of supervision is most helpful to you?
- What do you expect of a supervisor?
- How often do you think you will need to meet with your supervisor?
- How can we make supervision a place of support for you?

Emotional Well-being

- What can we do to best support your mental and emotional needs in the workplace?
- What should we watch for that might indicate that you are having difficulties within the work setting?
- How should we respond and what types of support do you feel would assist you?

Benefits

- Have you compared the health care and other benefits of this program with that you currently receive?
- Do you anticipate a serious loss in benefits due to the change?
- Are you aware of any way to offset that loss?

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions
designated for people with LE of mental health challenge

Creating a Successful Supervision Program

Supervision of a lived experience employee in the public mental health system is critical to the overall success of the position as well as the employee. As discussed previously, the lived experience employee and their supervisor require support and ongoing training to ensure effectiveness. Most experts recommend that supervision be provided by a competent mental health professional. The amount, duration and scope of supervision will vary depending on the demonstrated competency and experience of the peer support provider, as well as the service mix, and may range from direct oversight to periodic care consultation.

Regardless of the organizational chart, the individual assigned as a supervisor should:

- Understand and know how to apply the principles of family and consumer driven care;

- Believe in the intent of the position and its value to the overall service structure;

- Understand and be able to ensure all laws, regulations, and policies are maintained;

- Have respect for the effort of the employee;

- Apply co-active coaching or other interactive forms of supervision;

- Know how to provide mentoring that results in effective job performance; and

- Be high enough in the organizational chart to offer flexibility and support when necessary.

There are many issues that a lived experience position supervisor may have to address that may not be typical in the general work force supervision arena. These might include:

- Assisting the employee in identifying necessary workplace supports;

- Serving as an advocate;

- Minimizing stigma in the workplace; and

- Facilitating overall employee wellness strategies and healthy workplaces.

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions designated for people with LE of mental health challenge

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Successful Supervision Resources

Effective management of employees with mental illness

People with a diagnosed mental illness are likely to be aware of the types of stressors that can trigger illness. Supportive workplaces should be aware of stress factors, mental illness and ways to accommodate individual needs. Mental illness should be accepted in the workplace like any other illness or disability, as discussed in this resource.

http://jobaccess.gov.au/Employers/Being _a_disability_confident_organisation/Pla nning_a_better_workplace_and_creating _a_Disability_Action_Plan/Mental_health _and_wellbeing_at_work/Pages/Effective _management.aspx

Performance Management

The individual employee, the manager and the organization may benefit from a performance management process that is sensitive, positive and constructive. The organizational goals of performance management are discussed to improve the performance of a particular team and the company.

http://workplacestrategiesformentalhealt h.com/display.asp?l1=7&l2=92&d=92

A Manager's Guide to Psychiatric Illness in the Workplace

This guidance covers the effects of work on mental health, the effects of psychiatric disorder on work performance, the early detection of mental ill-health, and the management of the affected individual. It is not intended to be a comprehensive manual for managing work performance when mental health is a factor.

http://www.bing.com/search?q=%2bEffe ctive+management+of+employees+with+ mental+illness+in+the+workplace&FORM =RCRE

Try our Workplace Mental Health Quiz

This site tests your knowledge about some of the approaches to workplace mental health issues.

http://workplacestrategiesformentalhealt h.com/quiz.asp?quizid=1

How Do I Handle Co-Worker Issues and Conflict?

This resource looks at the supervisor's responsibility to help ensure a psychologically safe workplace and approaches to ensure that employees are successful despite issues and conflict.

http://workplacestrategiesformentalhealt h.com/display.asp?l1=177&l2=208&d=20 8

Managing Mental Health Matters

Addressing performance issues with an employee can be uncomfortable and even stressful for some managers at the best of times. This can particularly be the case when the employee is experiencing emotional distress. Yet, it is especially at these times where the skills taught in these episodes can make a difference in

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions designated for people with LE of mental health challenge

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the outcomes for the employee, the manager, and the organization. This resource addresses approaches for maintaining and protecting mental health at work.

http://www.workplacestrategiesformentalhealth.com/mmhm/performance.html

Mental Health in the Workplace

Mental Health in the Workplace offers scenarios, examples, and real life issues to assist in developing the skills necessary to monitor and support employees in the workplace

http://www.hr.com/SITEFORUM?&t=/Default/gateway&i=1116423256281&application=story&active=no&ParentID=1119278050447&StoryID=1119650774390&xref=

http%3A//www.bing.com/search%3Fq%3D%252bEffective+management+of+employees+with+mental+illness+in+the+workplace%26first%3D13%26FORM%3DPORE

Is It Possible to Manage Performance When Mental Health is an Issue?

This resource discusses how to plan for success to address performance management and improve effectiveness and increase the comfort level when managing an employee who may have a mental health issue.

http://workplacestrategiesformentalhealth.com/display.asp?l1=177&l2=207&l3=229&d=207

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions designated for people with LE of mental health challenge

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Supervision Tips and Recommendations

Types of Supervision

There are a variety of ways to supervise and a combination is generally the best way to ensure an accommodation of different and varying needs.

- **Face to face-meeting** in the office to discuss and review job duties;
- **Phone check** in to report, ask questions, and get assistance with direction and next steps;
- **Face Time/Tango** as a medium to check in and report with an opportunity to ask questions and provide oversight;
- **Regularly scheduled supervision**, such as each Monday;
- **Intermittent supervision** that varies with work load and availability;
- Electronic **check in via email** with required reporting parameters;
- **Triage** or as needed supervision; and/or
- Daily/weekly **written reports** that include required parameters.

Supervisors can implement management techniques that support an inclusive workplace culture while simultaneously providing accommodations that may promote employee success. Sample supervision techniques might include the following:

- Utilize or adapt to different approaches to supervision
- Provide positive praise and reinforcement
- Provide day-to-day guidance and feedback
- Provide written job instructions via email or text
- Develop clear expectations of responsibilities and the consequences of not meeting performance standards
- Reinforce these expectations and consequences regularly
- Schedule consistent meetings with employee to set goals and review progress
- Model and encourage open communication
- Establish written long term and short term goals
- Review and revise goals regularly
- Develop strategies to deal with conflict
- Develop a procedure to evaluate the effectiveness of supervision
- Provide sensitivity training to coworkers and supervisors
- Do not mandate that employees attend work related social functions
- Encourage all employees to move non-work related conversations out of work areas
- Establish a no-tolerance policy for bullying, stigma, and discrimination
- Become certified in mental health first aid

Adapted from: Accommodation Ideas for Depression, http://askjan.org/media/depr.htm

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions
designed for people with LE of mental health challenge

Supervisor Support of Persons with Lived Experience in the Workplace

The following tips can assist supervisors in supporting the unique needs of lived experience staff in the public mental health setting.

Educate:

- All levels of the program need to learn about mental illnesses, stress, wellness, available health and mental health benefits, and how to access those services. Just because the position is in a public mental health program, does not mean that all staff are aware of and understand disorders and treatments.

Prevent Stigma and Bias:

- Stigma begins with hurtful labels, such as "crazy" or "nuts." Encourage staff at all levels to discontinue such language and to start using "people-first" language (e.g., "a person with schizophrenia," as opposed to the dehumanizing term, "a schizophrenic").

Facilitate conversations:

- Create a safe environment in which staff members are encouraged to talk about stress, workloads, family commitments and other issues. Send the message that mental illnesses are real within staff and not reserved only for those served by the program.

Do Not Diagnose

- As a supervisor, do not diagnose an employee. However, discuss changes in work performance, and listen to the employee's response and concerns. If there are personal issues, suggest that the employee seek consultation from the Employee Assistance Program (EAP) or a mental health professional.

Maintain the Supervisor Position:

- It is not uncommon to be nervous about handling any employee intervention—nor is it uncommon to feel emotions about the situation when aware of the lived experiences of the individual. Let the individual express their feelings, but maintain control and keep focused on the work performance and not on personality. Avoid appraisals that are completely negative and be constructive; point out weaknesses, but emphasize what can be done to improve or rectify the situation. Be thoughtful about the timing and location of the meeting and make sure there is adequate time and privacy, and avoid interruptions.

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B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.5 Successful Supervision Tools and Resources

Source: Working Well Together (2010), pp. 210-216

Originally designed for: supervision of employees in mental health sector positions
designated for people with LE of mental health challenge

Make Reasonable Accommodations

- To support employees who are dealing with a mental health need, you may want to make some reasonable accommodations that will help them perform their jobs. Be prepared to accommodate the needs of the individual that has "standing appointments" for mental health treatment. The Job Accommodation Network (JAN) has a databank of accommodations that enable individuals who have specific disabilities to perform their jobs. Employers can call JAN with problems and a consultant will help them find solutions by feeding information into the computer system. There is no charge, but your organization must agree to be included in the databank. JAN is accessible at West Virginia University, P.O. Box 6080, Morgantown, WV 26506; 800-526-7234; www.janweb.wvu.edu. Additional ADA information is also available at 800-ADA-WORK. In addition, be familiar with the Family Medical Leave Act (FMLA) that entitles eligible employees of covered employers to take unpaid, job-protected leave for specified family and medical reasons with continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave. You can find more on this at: http://www.dol.gov/whd/fmla/ .

Be Prepared to Handle Emergencies

- Severe mental illnesses may be life-threatening to the employee. If a staff person makes comments such as, "I wish I were dead," or "Life's not worth living anymore," take these threats seriously. Dial 911, take the employee to the emergency room, or contact your EAP or a mental health professional immediately to seek advice about how to handle the situation.

Adapted from: What to Do When You Think an Employee May Need Mental Health Help, Mental Health America, http://www.mentalhealthamerica.net/go/employee-may-need-mental-health-help

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.6 Social Service Trainee Evaluation

Source: Fred Victor (2013), pp. 57-62

Appendix 9: Performance Evaluation

Social Service Trainee Evaluation

The Social Service Trainee Evaluation is to be completed mid-way through the program and end of November/early December.

The supervisor will review this evaluation process with the Social Service Trainee, provide a copy of the evaluation form and allow time for the Social Service Trainee to fill out applicable sections. Section 1 is to be completed by the Social Services Trainee and Section 2 is to be completed by both the Social Service Trainee and the supervisor.

Once these sections are complete, the Social Services Trainee and her/his supervisor will meet to review performance, discuss goals and prepare a work plan for the coming months (if the Social Service Trainee is staying in their current placement). Following this meeting, the supervisor will prepare the summary of the review in Section 3. The summary of the review will then be signed by the supervisor and Social Service Trainee.

Section 1: Overview of Past 6 Months   (Completed by Trainee)

For period covering from: _____ to _____

- List your major tasks and accomplishments over the past 5 months. Please comment on your achievement of objectives for the review period (based on your work plan if applicable).

- List any significant factors that affected your work over the past 5 months (e.g. changes in job duties or staff team, increased volume, etc).

- List any staff development training you took over this review period.

Section 2: Key Competencies   (Completed by Trainee and Supervisor)

1.   Interpersonal Skills

- Has effective listening skills with co-workers and community
- Provides constructive feedback to other staff
- works co-operatively with staff team and community; contributes positively to staff team
- Uses appropriate conflict resolution processes when needed
- Has a professional manner; relates to all in a respectful, fair and friendly manner
- Maintains confidentiality and appropriate professional relationships within the guidelines of the organization

Overall Rating	
Meets overall expectations	_____
Exceeds expectations	_____
Needs Improvement	_____
Does not meet expectations	_____

Please provide comments.

2.   Communication

- Verbally communicates ideas, concepts and relevant information clearly and effectively
- Communicates clearly, effectively and accurately in writing (for example: reports, meeting minutes, proposals, memo, log entries, correspondence)

Overall Rating	
Meets overall expectations	_____
Exceeds most expectations	_____
Needs Improvement	_____
Does not meet expectations	_____

Please provide comments.

Appendix B: List of Tools from Other Sources

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.6 Social Service Trainee Evaluation
Source: Fred Victor (2013), pp. 57-62

3.   Problem Solving and Decision Making

- Able to identify, define, analyze, and solve problems with appropriate consultation
- Makes thoughtful, informed decisions with appropriate input and considers impact of decisions
- Makes sound decisions under pressure or with conflicting demands/information
- Generates or supports creative solution-building and change to meet service/program/department goals

Overall Rating	
Meets overall expectations	____
Exceeds most expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

4.   Organization and Planning

- Plans, prioritizes, and organizes work effectively (ie daily, monthly, yearly)
- Manages time effectively and completes tasks by deadlines

Overall Rating	
Meets overall expectations	____
Exceeds expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.6 Social Service Trainee Evaluation

Source: Fred Victor (2013), pp. 57-62

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5. **Judgement and Initiative**

- Uses sound judgement on a day to day basis
- Displays sound judgement in handling conflict/crises
- Shares appropriate information with others in a timely fashion
- Anticipates and prevents problems
- Demonstrates initiative

Overall Rating	
Meets overall expectations	____
Exceeds expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

6. **Learning and Development**

- Seeks out and participates in learning and development activities; keeps current with new ideas and builds knowledge
- Seeks and receives feedback; reflects on and applies learning from experiences
- Demonstrates flexibility and appropriately responds to changing circumstances
- Demonstrates openness to new tasks

Overall Rating	
Meets overall expectations	____
Exceeds expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

7.   Work Habits

- Attends work for scheduled shifts
- Is punctual and is prepared to start the shift on time
- Maintains departmental and legislative safety standards as applicable to the job
- Keeps work area clean, orderly, and safe

Overall Rating	
Meets overall expectations	____
Exceeds expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

8.   Work with Community

- Seeks and respects community input and where appropriate, ensures effective community participation
- Demonstrates an understanding of systems that cause homelessness, poverty, and discrimination and understands how this affects community members
- Demonstrates an understanding that people living on low incomes are a resource to themselves and the organization (e.g. in resolving problems or challenges).
- Actively listens to and conveys understanding of clients' requests and responds appropriately
- Delivers high level of service as defined by departmental and/or organizational goals and outcomes
- Strives to achieve user of service satisfaction

Overall Rating	
Meets overall expectations	____
Exceeds expectations	____
Needs Improvement	____
Does not meet expectations	____

Please provide comments.

9.   **Program Specific Competencies**

-
-
-

Overall Rating
Meets overall expectations   ____
Exceeds expectations   ____
Needs Improvement   ____
Does not meet expectations   ____

Please provide comments.

Appendix B: List of Tools from Other Sources
B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT
Tool B5.7 Workplace Accommodation Essentials
Source: Hire for Talent (2017), section 13.1, PDF version, pp. 1-3

13.1 Workplace Accommodation Essentials

Providing workplace accommodations may seem like a daunting task, particularly for those running a small business or who are building a startup with limited funds. However, most accommodations cost little to no money and in many cases, just require a little creativity and flexibility from both the employer and the team member requiring supports.

In Tool 3.2 Legal Issues, we cover the definitions of the Duty to Accommodate and in Tool 3.3 the importance of understanding Undue Hardship, but what is a reasonable accommodation?

Reasonable Accommodations

While the need for accommodations can vary depending on the person's abilities, workplace setting, and/or requirements of their role, providing reasonable accommodations typically means a slight modification to the environment or way in which a task is performed in order to give the employee an equal opportunity to fulfil the core functions of their duties, while not causing undue hardship to the employer.

Did you know?

Not every person with a disability needs an accommodation. In fact, employers can benefit from the specific skills of qualified people with disabilities without needing to make extensive modifications to the physical workplace or the overall work environment.

Types of Accommodations

When most people think of workplace accommodations, it is easy to jump to ones that impact the physical environment (elevators, ramps or the removal/widening of doors); however, structural changes are only one part of the equation, and often not required at all. The 4 main types of accommodations are:

1. **Flexibility / Policy Changes:** These include modifying work hours, the location of duties, and how tasks are expected to be completed to fit the needs of the individual. Often these changes cost $0 to implement.

2. **Personal Supports:** These accommodations may be subsidized by government programs. (e.g. job coaches, guide dogs/service animals, personal assistants, or support workers.)

3. **Equipment:** There are programs to cover most costs for equipment accommodations. (e.g. Technical devices, alternative work materials, communication aids, or ergonomic workstations.)

4. **Structural Modifications:** These are commonly funded through grants since they can often be the most expensive. (e.g. Hand rails, ramps, widened doorways, or increased accessibility to common facilities.)

Understanding the Costs of Accommodations

A Job Accommodation Network (JAN) study found that "56% of accommodations cost absolutely nothing to implement **$0,** while the rest of the accommodations made had a typical cost of only $500." [1]

Flexibility / Policy Changes
Cost to Employer: $0

These are the most common accommodations requested and include:

How work is performed (e.g., allowing cashiers to sit or stand)

When work is performed (e.g., flexible scheduling, compressed work week)

Where work is performed (e.g., remote work locations, whether full-time, part-time, or occasional)

Personal Supports
Cost to Employer: $0

These types of supports are usually in place before an individual with a disability is seeking employment. If the individual is utilizing a personal assistant or care worker, they will likely be with the employee for the duration of the workday. If this is the case, providing them access to all the spaces this employee is expected to be is vital. Guide dogs and service animals are professionally trained work animals that are matched to clients' needs based on walking speed and home/work environments. Non-profit organizations gather donations to provide these dogs for free to families (since it can take up to 2 years and $35,000 to train each dog).

Equipment and Alternate Materials
Cost to Employer: $0 - $1500 (Grants may be available)

Most equipment requests include the purchase of things like desk lamps for task lighting, specialized software for getting specific work done, and/or ergonomic office chairs or desks for long stints at the computer with adjustable desk heights to accommodate either sitting or standing. However, with a lot of employers today having staff work remotely, they may already have this equipment for use at home.

Provide large print and photos in documentation and signage (both internally for staff and externally for customers) with alternate print sizes of at least 18pt font for printed materials and

B5 TOOLS FOR DURING EMPLOYMENT AND CAREER ADVANCEMENT

Tool B5.7 Workplace Accommodation Essentials

Source: Hire for Talent (2017), section 13.1, PDF version, pp. 1-3

signage with at least a 72pt font. These sizes are easier to read, especially using sans-serif font types (e.g. Verdana, Arial.) If you're an Office 365 user, there are also several new accessibility features including automatic live-captioning and accessible presentation templates in PowerPoint. This is ideal for individuals with low-vision and will also accommodate employees and customers who may be deaf or hard of hearing. Adding photos to digital documents (with Alt text) and other visual cues will also make it easier for employees or customers who would benefit from the use of picture symbols instead of letters and numbers.[2]

Structural Modifications
Cost to Employer: $0 - $10,000+ (Grants may be available)

Although structural modifications tend to be the most expensive, a lot of the costs can be circumvented with thoughtful planning and the support of an accessibility professional. If a business is leasing a space, it is worth talking to the building owner about the addition of ramps, elevators and power-assisted doors due to the long-term benefits to both employees and customers. Canadian organizations like StopGap Foundation[3] may be an option for businesses looking for a subsidized ramping solution or the Enabling Accessibility Fund Grant[4] may be more suitable for larger projects.

When in Doubt, Ask the Person

No matter what accommodation may be required, no employer is expected to be an expert or to know all the needs of their employees. The best thing that can be done is simply asking each person if there are accommodations in the workplace that they require to support them in doing their job. This may not be something they can answer when they first start their role, so you may want to check back every 3 – 6 months to see if their needs have changed.

Sources:

[1] *Job Accommodation Network. (2021, October 21). Accommodation and Compliance: Low Cost, High Impact. Retrieved from* https://www.shrm.org/hr-today/news/hr-magazine/documents/lowcosthighimpact.pdf

[2] *Microsoft. (2020, February 13). Creating Accessible Workplaces in 2020. Retrieved from* https://news.microsoft.com/en-ca/2020/02/13/creating-accessible-workplaces-in-2020/

[3] *Stopgap.ca - Request a Ramp. Retrieved from* https://stopgap.ca/get-involved/request-a-ramp/

[4] *Government of Canada. (2021, June 25). About Enabling Accessibility Fund. Retrieved from* https://www.canada.ca/en/employment-social-development/programs/enabling-accessibility-fund.html

Disclaimer:

Hire for Talent has made every effort to use the most respectful words possible while writing these materials. We realize, however, that the most appropriate terminology may change over time. We developed these materials with the intent to respect the dignity and inherent rights of all individuals.

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