

**Partnering with PLE Lessons Learned**

**0:00:02.7 Alisa Parrish:** Alright, thank you, Cherita. As folks are getting settled with us today, we'd love for you to introduce yourself in the chat with your name, pronouns and race, if you'd like, and then one word or a phrase that really describes how you're showing up with us in this space today. My name is Alisa Parrish, my pronouns are she, her, hers, and I am Asian. Our presenters here today are really gonna touch on why we include pronouns and racial identity in our intros, which was really less marker, that's our style.

**0:00:31.8 AP:** We are really excited to introduce you to this Lessons Learned Webinar from the 2021 cohort of community workshops. In the spring of 2021, this specific workshop was actually called Authentic Stakeholder Engagement. And one of the lessons that we learned, is that words really matter and that the word stakeholder is kind of fluid and that people define it in really different ways. Which really caused some confusion about the actual focus of the PLE workshop. So for fall of 2021, the name of this specific workshop was changed to Partnering with Persons with Lived Experience, which really much more clearly captured the focus and work communities would be doing throughout the workshop.

**0:01:14.4 AP:** This webinar today will really highlight what communities and facilitators together learned through participation in these community workshops. As communities really look to meaningfully and authentically engage people with lived experience at the local level, in their decision-making processes, the lessons that were learned through the community workshop, we feel will be really relevant for you all. So please use the chat to add in any questions at any point and we'll answer as many as we can, as well as in live time and then we'll try and get to as many as we can at the end as well. Just a quick note that the listener message that went out above this webinar stated that it is 60 minutes, but we do plan on going for 90 minutes today. So hoping you all can stay on with us for the duration. And without further comment from me, I am honored to introduce Masetta Dorley, Lauren Leonardis and Dusty Olsen as today's presenters. And I'm gonna hand it over to Masetta.

**0:02:11.6 Masetta:** Thank you so much, Alisa, for the introduction. It is a pleasure to be presenting with my co-facilitators today, to share the lessons learned during the fall community workshops. On today we will be sharing quite a bit that we hope to be of value in your efforts to partner with persons of lived experience. Our agenda items for discussion include, reflecting on community readiness, providing an overview of full workshops and lessons learned and lessons learned with community examples, as well as sharing teachable moments and learning spaces.

**0:02:53.6 Masetta:** Next slide. Now, let's first begin and discuss community readiness. Next slide. When you see the term, some may ask, "What exactly is community readiness?" Community readiness is the degree to which a community is ready to act on an issue. In this case, implement processes for partnering with persons with lived experience. A community can be more than ready to address one issue, while being at the very earliest stages of readiness in relation to another. Partners may know a great deal about the issues and realize it's a problem, for instance, but be unable to conceive of implementing a particular solution.

**0:03:48.2 Masetta:** Some groups, those directly affected by the issue, for example, may be far more ready to deal with it than others. However, as I will share in the next few slides, they're really several ways to help communities move towards a higher level of readiness, in regards to partners of the... With those of lived experience. You can start by ensuring that all work is based on a foundation of racial equity. It's important that communities are being intentional to establish a

commitment to best practices, meaning going above and beyond the standard requirements. Communities can work together to have the ideal team at the table. And also, communities can ensure that there's a culture that is open to changing, learning and listening.

**0:04:45.4 Maseta:** Next slide. The first and very important step is to ensure that there is a foundation of racial equity. Now we all recognize that because of historical and current structural racism, people of color are dramatically over-represented among those experiencing homelessness. Comprising approximately 60% of the homeless population in America, compared to only 39% of the general population. In order to undo system of oppression, we really need to understand the foundation of systemic racism in our community, in order to create a new and inclusive system. Having a foundation of racial equity really serves to strengthen local leaders, knowledge and capacity to eliminate racial disparities. It can heal division and it can also build more equitable community. The Center for Assessment and Policy Development, as well as Center for Social Inclusion provided several descriptions to understand when you're discussing racial equity. First, we are familiar that equity refers to proportional representation by race, class or gender of opportunities in housing, health care, employment, and all indicators of living a healthy life. That is a difference from equality, which is defined as treating everyone the same and giving everyone access to the same opportunities, without regard to where people may be starting from.

**0:06:34.7 Maseta:** And finally, racial equity is the condition that would be achieved if one's racial identity is no longer predicted in a statistical sense, one's housing, economic, and health outcomes. For example, notice in the beginning of this webinar, Alisa used race and gender as a part of her introduction. It's important because within this work, we lead with race due to the different inequities across all indicators for success, which have been found to be depressive and have been integrated in our systems for a very long time. We also know that other groups of people are still marginalized, unfortunately, including based on gender, sexual orientation, ability, and age to name a few.

**0:07:28.6 Maseta:** Also identifying during introduction, provides acknowledgement of who is at the table and who is missing. Representation matters, and having the ability to see who sits at your table in your community can allow for understanding the role you can play in the fight towards racial equity, justice, and equal partnership. Next, there must also be commitments to best practice, ensuring your community goes above and beyond the requirement. For example, we know that HUD requires that all CoC Board must include at least one homeless or formerly homeless individual. Well, we are really encouraging communities to process and move really beyond that requirement and establishing best practices of partnering with persons of lived experience, right?

**0:08:31.6 Maseta:** To ensure that individuals are included at all levels of systems planning and implementation. When inviting individuals to become a partner, it is important to follow these key steps. Start by informing. Informing key partners with balance an objective information to assist them in understanding the problems alternative and opportunities and/or solution. You can do this by sharing materials ahead of time so that it can be reviewed, processed, and understood. And new partners can also field well prepare for the work that lies ahead. Consult by obtaining feedback on analysis, alternative and/or decisions from those who are truly close to the work or from those who have lived experience.

**0:09:24.5 Maseta:** Involve others by working directly with partners throughout the process to ensure that concerns and aspirations are consistently understood and considered. Collaborate with

partners in each aspect of the decision-making process, including the development of alternatives and the identification of the preferred solution. And finally, it's important to empower partners by incorporating final decision-making power in their hands. And you'll hear a little bit more about that when my colleague Lauren discuss the workshop overview. Next slide.

**0:10:08.7 Maseta:** In order to be successful in engaging partners, your community, should truly first work on building your ideal team as early as possible. When developing your ideal team, it is critical that you partner with a diverse range of local individuals to ensure your project is rooted in equity-based decisions.

**0:10:34.3 Maseta:** There are various population groups that are either disproportionately impacted by the homeless system of care or facing elevated risk. People belonging to these populations, and the organizations that work with them are well-positioned to lead communities in assessing the impact of marginalized groups and devising cultural responsive solution. When developing your ideal team, make an inventory of existing partners, highlighting who is here versus who should be here. Make sure that your community partners... Your community operate with authentic intention to first use local expertise, right? I, for one, am a person of lived experience and really have been excited to serve as a co-facilitator for this community workshop for the past two and a half months because I value the topic at hand.

**0:11:42.2 Maseta:** And so such as I within my firm that has that experience, there are local leaders within your community that are from organizations that can serve as partners and can connect you to other organizations. Such as local faith-based groups, other social service agencies, and community-based organizations that have a wealth of insight and expertise. It's important also to amplify the voices of those with lived experience in your community by making sure that there's a diversity of partnership, which includes Black, Asian, Latins. Specific islanders, and indigenous population, includes people who identify as LGBTQ and gender expansive. People living with disabilities, people with experience with the criminal justice system, and people who serve poor, young, and of course, seniors. To include persons of lived experience, reach out to your local TLC and ESG providers, who may have an established relationship. Particularly with people belonging to the key underserved population mentioned above, and those with recent experience with homelessness and the homeless service systems. Those with lived experience have the best understanding of the problems that exist in the homeless system, and the knowledge of services.

**0:13:11.3 Maseta:** And interventions that are the most effective solutions to prevent and end homelessness. It is critical that people with lived experience are centered in the engagement process to ensure that programs and policies are shared by the population served. After amplifying the voices of those with lived experience is important to be intentional when centering intersectionality in your analysis. We all deserve to have our voices heard, our faces and experiences reflected in the community culture and our unique needs addressed to relevant policies. However, when a community fails to incorporate intersectionality into your everyday practice and policies, you can tend to leave parts of your community behind. Intersectionality is the acknowledgement that everyone have their own unique experiences of discrimination and oppression, and you as a community must consider everything and anything that can indirectly marginalize people including race, gender, class, sexual orientation, physical ability, etcetera.

**0:14:34.3 Maseta:** Next, it's important that when you're developing your ideal team, that you pay people for their expertise. Paying people belonging to key population for their expertise and

contributions demonstrates understanding, demonstrates your community, understanding the value that individuals bring to this work as experts, providing compensation that reflects living wages or consulting rates show a community true investment to partnering. There's going to be a little bit more deeper dive in specific community examples later on in this webinar regarding paying people for their expertise. Finally, after in the process of developing your ideal team after you use local expertise, you work to amplify voices of those with lived experience, you making sure that your work is center on intersectionality, you've developed a compensation plan, it's important to develop community agreements.

**0:15:43.6 Maseta:** A best practice for community building with partners is to be intentional about the ways in which you gather and share space. How you work together is just as important as the work you are doing. Developing community agreement is a powerful strategy for coalescing a group into a team. Community agreements are helpful because some of the most critical conversations teams will have, can be emotional, painful and uncomfortable. So agreement help identify concrete ways to create a culture that is respectful, comfortable, open, curious, and kind to talk about and through conflict. Using these practices and tools your community can challenge themselves and each other while still recognizing they're all coming from different places of knowing and transforming. Next slide.

**0:16:41.8 Maseta:** Okay, so after you've developed your ideal team and you're ready to start the work, it's important to make sure that there's a culture that surrounds your team that incorporates a shared set of values and expectations, which influences how you interact and collaborate with one another to achieve common goals. In order to build communities that are powerful enough to attain significant change, we really truly need a large number of people working together. Each culture group has unique strength and perspective that the larger community can benefit from, and understanding cultures will help us to inform... Help us to overcome and prevent racial and ethnic divisions. So, just know that people from different cultures have to be included in decision-making processes, from programs or policies to be effective. It has to be a true reflection of what your community reports and those who are accessing service as well as those who are providing service. And there must be an appreciation of culture diversity and culture humility to go hand in hand with a just and equitable society. And now I'm going to pass it over to my colleague Lauren to discuss the overview of the full workshops and lessons learned with community examples, Lauren, you wanna take it away?

**0:18:10.4 Lauren Leonardis:** I sure do Maseta. Can we go forward a slide please? Awesome. Maseta, Desi I'm gonna welcome you all to pop on here with me. Maseta if you wanna take a break off cam for a sec. That's fine too. My name is Lauren Leonardis. I use she/her pronouns and I'm going to just do a quick overview and throughout that overview, we're gonna use some examples of different communities of things that we've learned along the way. Okay, so one of the first things that I wanna highlight is that everybody who's been through this workshop, and I'm sure all of you who are here on the call or who might listen to the recording later, you all are starting from different places and are going to move the different paces, you all have different capacities. And that's just a part of the work. And that's totally okay. So that's a big part of what I want to talk about and highlight here. We're gonna talk about community reflections, re-imagining leadership, capacity building, and accountability and sustainability. In the workshop that we did, these are each sessions that happen individually where we really expand and dive into these topics.

**0:19:25.0 LL:** First I'm gonna talk about community reflection. So in the workshop, we ask

communities to reflect a lot about where they are currently, and what are their goals, where are they going? Some of the very first example of things that we ask in doing that, in your community, how do you currently invite consumer feedback? So I wanna pause here for a second and just note that the word... It says I lost connection.

**0:19:56.7 AP:** We can still hear you, but we did lose your video...

**0:20:00.6 LL:** Oh, 'cause I called in. I'm sorry. That's terrible timing for that to happen, but I'll just have to have folks help me with the slides for a minute while I also try and figure out how to get back on here. Okay. It doesn't give me a camera option anymore, I'm sorry, technical problems here. I think it put me in as a participant. Okay, I'm just gonna keep presenting, and I guess you just won't get to see my face, we'll figure that out later, 'cause I don't wanna muck this up too much. So if I can have my co-folks help me with the slides, that would be dope. So, I was on community reflection, so some of the first questions that we ask folks to reflect on. The first one is, in your community, how do you currently invite consumer feedback? So the reason we use consumer as a word here is because many communities are familiar with that language, that's the language that they often use in their own. However, consumer doesn't really set a positive tone for partnership. Consumer is very one-sided, it means someone that's coming and seeking or doing or buying or consuming, right?

**0:21:14.7 LL:** When you're trying to invite folks in as partners to the work, I would suggest that you start using different language there. Partner or lived experience expert or action group, or advisory group or advocacy group, or all sorts of other words, just not consumer. Another question to look at is, is consumer... Oh my goodness. I'm so thrown off right now, I'm sorry, folks. Is feedback used to inform programming or the system? You can get feedback at lots of different levels along the way, right? How does or could your system benefit from the expertise of people with lived experience? So, we all know there's lots of different points where we can grow. What are the points where you know, you can identify that you need growth from right now?

**0:22:07.1 LL:** And what are the goals you're hoping to get out of this workshop? And if y'all have thoughts on any of those questions, again, these are some of the first things that we ask in the workshop, so feel free to add some of those thoughts in the chat now while you're thinking about it. One of the final things we do in the community reflection process is to conduct a community assessment to understand a starting point. So the community assessment is a set of... It's a tool that has a set of questions in it that helps you to understand how you're doing in equity and involvement. And lots of communities come out of that feeling really differently.

**0:22:44.7 LL:** There's... Alright, sorry. Let me go to the next slide. So we're gonna talk about community examples. And again, as I said before, communities are in very different places when they start, and that's totally okay. It can get overwhelming to realize that you have a lot of work to do, 'cause we all have a lot of work to do. It doesn't matter where you're at currently, or how much work you've already done, I promise you there's still more to do. And don't compare yourself to other communities who've had a head start. We'll talk about that in a second, in the community examples as well. There's folks who've already been doing this work, and that's part of what's really exciting, 'cause now you have folks to learn from, but you shouldn't be comparing yourselves or beating yourselves up because other folks might be ahead of you.

**0:23:38.7 LL:** And finally, different experiences in conducting the community assessment. So, you

have to make sure you have the right people taking the assessment, 'cause if you don't then you're going to get answers that don't actually reflect where you need to change. If you're not inviting people with lived experience to help... Excuse me. In that community assessment process, then you're not truly assessing how your community is doing. In order to reflect, there needs to be community agreement. You need to have safety and honesty in order to plan and grow. If folks don't feel like they can be honest with you in that process of reflecting and assessing, then you're not going to be able to create the space where you can create plans that allow for growth. And I'm gonna turn it to Jessie Maseta to do the examples while I try and fix my situation really quickly.

**0:24:37.8 Dusty Olsen:** And we've actually lost our coordinator, so hopefully... [chuckle] We lost Cherita too, so something's going on with Adobe because people are getting kicked off, so it's not just you, Lauren.

**0:24:52.1 AP:** Yes. I'm trying to sign back in now. I'm sorry. I'm sorry, ladies. I'm trying to sign back in right now.

**0:24:56.1 DO:** We might have lost Maseta too. I'll go ahead and talk a little bit about a community example, about being in different places. So, we've had the opportunity to work with a lot of different communities through this process, and some really had no engagement yet with person's of lived experience in their system. So when we asked them to do this assessment and do their community assessment, it was essentially only system people that were doing their assessment, and they came up with really feeling like they were doing pretty good. And then when we... When they engaged persons with lived experience later on through the workshop process, that wasn't necessarily... The perception had changed. Versus communities that were already... Had been able early on to invite persons with lived experience to join their team and go through the workshop with us, and had the perspective right from the beginning with their assessments.

**0:26:23.7 DO:** They assessed themselves in a much different place. So, everybody does start in a really different place, and some people think they're doing better than they are, and they feel like they're going backwards once they learn more, but when you know more, you do better. Right? And so we always like communities to understand that they may feel like they're doing really good, and then when we get into some of this information they're like, "Wait a minute. I didn't know I was supposed to be doing that or this." So, definitely want to reaffirm for everybody that, it's a starting phase, and that we work from where we're at, and that's the goal.

**0:26:54.3 LL:** That's really...

**0:26:55.2 Maseta:** Exactly.

**0:26:55.4 LL:** That's a good example.

**0:26:57.3 Maseta:** Oh.

**0:26:57.3 LL:** Nope, go ahead, Maseta.

**0:26:58.8 Maseta:** Okay. Yeah, no, that was a great example, and I remember that. And I was going to share about the community agreements and the value and how does that help with providing safety to express dissenting opinions that people may have. Because when you're getting

a group together with different objectives and from different geographical landscapes, every person and their experience is different. And when meeting as a group, community agreements serve to kind of create a safe space that may go against the grain of the overall body, but having those agreements established and verbalized and read by community members, it really helps to leverage that and establish an environment where those partners really feel trusted, safe, and they're willing to be open and engaged. And I know, you know, lesson learned, that we did was that within the workshop, when we started, we had to backtrack to be able to establish a community agreement for the overall group, which did serve as a reminder for everyone as in how we will show up in the space.

**0:28:16.2 LL:** Awesome. Thank you. And I'm back. So thank you to our wonderful help, getting this set up, Cherita, that was a minor disaster. [chuckle] So I'm gonna move us to the next slide now. So now we're gonna talk about re-imagining leadership. And I think that's where a lot of folks start from. When they do that reflection, they realize, no matter where they are in that point, you have to do some level of re-imagining leadership in order to move to the next point. Those closest to the issue are closest to the solution. I feel like that's pretty obvious, and I feel like that's why we're all here. People who have lived experience have a really unique perspective in what it means to go through these systems and to experience these things firsthand, and they are going to be the ones who know where the gaps are. They've been the ones to see them the whole time. And of course, you need other experts in the space as well. However, if you don't have people with lived experience, you're going to miss extremely important gaps and holes in your current plan. So people with lived experience and the BIPOC community leaders have to be centered in the work to respond to homelessness.

**0:29:31.5 LL:** Now, when I say centered, what I don't mean is that no one else at the table should share their expertise, because I think there's lots of folks who've been doing this work for 20 something years or five years or whatever it may be, and y'all have expertise that is just as important too. What it means though, is that these are spaces that... The playing field has not been level and so you have to be really intentional about how you are making sure that these community leaders are being brought in and listened to and the action comes from what they're saying. Whereas if you have people who are in positional leader positions, these are folks who've just been hired and they need to be able to work together with the leaders who are working to create outcomes directly within the community and the people who have lived experience.

**0:30:20.9 LL:** Now I'm gonna talk about transformational relationships. These transformational relationships directly oppose the sort of transactional relationships... Sorry, my audio thing keeps popping up, it doesn't realize that I'm still on my phone 'cause I got disconnected before. Transformational relationships directly contradict, and is the better side of transactional relationships. And I think you hear that when you hear the consumer word, right? When you're looking for consumer feedback, that is a very transactional thing. You're thinking about a buyer and a seller. There is a power dynamic involved in that. Whereas when you think about a transformational relationship, I'm learning and I'm getting something from you and you're learning and you're getting something from me. So when you have people with lived experience, they need to be adding as much value as you are giving them, and that doesn't come from just money, that's transactional.

**0:31:20.1 LL:** Where that comes from is the relationship building, the training up, deeply involving... The growth that comes from deeply being involved in a process and doing the job. So I

come mostly from the world of youth and young adult homelessness, and so what you'll often see here is people think like, "Oh, it's really hard to involve young people 'cause they don't know how to do the work." Listen, let me tell you something, if you're an intern and you're a young person in that same age bracket and you show up to some of these processes, you obviously don't know how to do the work. Everybody who shows up as a brand new person in the work doesn't know how to do the work, and that has nothing to do with being a person who has lived experience, it just means that the people who have lived experience have a different kind of expertise that you are trying to tap into, and they need to be able to have access to that space. You have to be able to create these transformational relationships that allow the growth of both them, and of your work, and of you.

**0:32:19.9 LL:** It doesn't go just one way. And so you have to provide meaningful work by engaging in co-design, problem solving and decision-making. When I say something like decision-making and all of these things, like co-design, I don't mean like, "Oh, well, I'm building a shelter. We've already decided everything that has to do with it. Do you wanna paint the art that goes on the wall? Would you like to pick out the board games that we buy for the shelves on the side? What colors should we paint the walls?" No, I mean involve people with lived experience in the hiring process of the staff that are running the program, involve them in the design of the actual program, involve them in the top down, not the bottom up.

**0:33:04.6 LL:** I'm gonna go to the next slide, please. Thank you. Alright, so we're gonna talk about some community examples and things that we learned from that piece. People experiencing homelessness are not a homogenous group, and one person can't represent them all. When you're thinking about leadership, you can't just have one person on your staff kind of check that box. They don't represent all the other people involved. You need to be able to think about how are you bringing up leadership? And, how are you encouraging folks who have lived experience to reach out and help mentor new folks who have lived experience, so that you're not just endlessly checking boxes. Which actually is the next point I was gonna make. Staff with lived experience don't check that box, they hold a different role. They have this ability to be really great mentors because they've been there. I myself also have lived experience. And I feel like in my world, in my job, it's my job now to bring up other people, especially...

**0:34:06.8 LL:** Again, I work mostly with youth and young adults. Other young adults who have experienced homelessness, my job is to make sure that they have a space in the work that I'm doing, and not to run my mouth so much, but to step aside and make sure that they get to be the ones taking up space. So I hold that space with and for them. And they should be empowered to transfer and hold leadership, too. And leadership means not treating someone like an add-on. It means shifting the power and allowing them to hold power and lead meeting. It doesn't mean I write an agenda and then I say, "Hey, you wanna have this part for you?" It means being able to go to them and say, "Hey, what needs to go on our agenda today? What is the work that needs to get done? What is it that you are prioritizing for us today?" And being able to work on those things together in partnership.

**0:35:02.2 LL:** Can I have the next? Oh, community example. Sorry, let me pull up my notes again. Gosh...

**0:35:08.6 AP:** Maseta 's got a great example for this one.

**0:35:13.2 LL:** Thank you. Go ahead, Maseta.

**0:35:16.7 Maseta:** Yeah, I remember one of the communities which was really, really great practice in centering those with lived experience in being a full-on partner, like you said, Lauren, in treating them not as an insert but as a partner from the beginning to the end. And one of the things that they did was one, and you mentioned it, they allowed those with lived experiences in the one-on-one PA sessions, to create the agenda for the discussion. They also then took a step back and allowed individuals who were either experiencing homelessness and/or doing the work, to be the first person to be able to provide feedback, so that it's not only their voice that was heard first. And then they also allowed those of lived experience to help lead and facilitate the meetings. And the meeting schedule, not based on when the professional worker was available, but when they were available. And I really, really appreciated that intentionality of how they were just really focused on ensuring that that was a true form of partnership, so then that those who they're looking to partner with can be involved in every aspect and not miss anything. And, feel a part of the process and not feel as an insert.

**0:36:53.1 LL:** Fantastic example, Maseta, thank you so much. Alright, I'm gonna bring us the next theme. So we're gonna talk about capacity building. We need to be able to dedicate a budget to adequately compensate and provide staff support for people with lived experience. We just talked about a bunch of great things you should do, but if you don't have the money to pay for it, then it's going to be impossible to do it. You need to be able to prioritize that and adequately compensate folks for their time. And you need to engage people with lived experience in the designing of the compensation plan. They need to have a really clear understanding of some of the differences between being an employee versus being a consultant, or what the going rates are in the field, or all these different things for them to be able to consent to the compensation that's happening.

**0:37:50.5 LL:** You need to understand how it's gonna affect their benefits, or the difference between getting a gift card and pizza, versus getting paid \$40 an hour, or whatever all those different moving pieces are. You need to engage them in understanding that, understanding the options, and helping you design that plan. Ensure meetings are fully accessible to promote participation, including considerations for potentially triggering topics. So, if you can't make sure your meetings are accessible, people literally can't join them. It's just that simple.

**0:38:23.1 LL:** For example, I was just having a lot of trouble with the technology here, if I had been joining this from my phone, then this would have been really impossible to navigate just now. If you can't make sure folks can join your meeting, they don't get the chance to participate in the conversation and unless someone is directly working with them, to make sure they have the access to the meetings, especially since we're all on Zoom for right now, we're on we connect or whatever service may be, you need to make sure folks have the information, they have the calendar invite. If they don't follow their calendar as closely as you do, you need to be reminding them. Unless you have a job in an office where you're constantly checking your calendar, lots of folks don't ever look at those things. You need to make sure they have the technology to be able to get on here. Any technology that's necessary to participate in a meaningful way. That means you might need to provide things like computers. Or, you might at least need to provide access to computers.

**0:39:29.5 LL:** You need a WiFi connection spot or a hotspot that you can let folks borrow when you know they need that. It also means providing the things like training and coaching for people with lived experience, and just as importantly for existing members on inclusion of people with lived experience. Again, this brings me back to my point before about transformational

relationships. Y'all need to recognize where you need to grow and where you can learn from people with lived experience, too. It doesn't go just one way. It doesn't mean that people with lived experience need to learn how to be professional enough for you. It means that you need to know how to work with folks who maybe have experienced trauma, maybe haven't been in as many professional settings, or maybe they have, and they just wanna use a different language than you use. Whatever it is, y'all both need training and coaching to be able to access each other fully, right?

**0:40:27.8 LL:** Okay, we're gonna talk again about some of the examples that we learn from the capacity-building segment. So, development of a compensation plan can be a place that communities get really stuck. I think money is always a really hard topic, right? Ensuring that participants are fully informed of impacts of different compensation forms and amounts prior to deciding on the preferred compensation. I think I touched a little bit on that before, too. People with lived experience need to be prepared for difficult situations that might be triggering. And the infrastructure needs to be in a place to accommodate the different perspectives and roles of people with lived experience. And, let me check what examples we have for that. So Destiny, I'm handing it to you first.

**0:41:16.9 DO:** Yes, you are. I think a great example that we experienced when I was working with a community during this last session is this idea of getting stuck on a compensation plan, right. We actively encourage communities to partner with persons with lived experience to develop their compensation plan, right. We don't all get to sit in a room and decide how we're gonna pay people. We need to talk and ask people about what makes sense for them after we have given them the information. But then, one of the communities that I was working with was like, "Well, but wait a minute, we wanna pay people to help us develop the compensation plan. How do we know how best to pay the people that are gonna partner with us to develop the compensation plan?" It became this like chicken and egg circular thing, right.

**0:42:00.8 DO:** This is a scenario where you have to start somewhere, right. Don't let perfect be the enemy of the good. What I encouraged them to do was pay people the way that you had available to you in the immediate moment to bring them in to partner with you to develop a long-term compensation plan. We can't start with like, "I'm gonna ask this person and then develop a partial plan to bring a group together and develop a bigger plan." Just start somewhere. But that place needs to be starting with paying somebody. You do not bring people in to develop a compensation plan, and not compensate them while they're part of that process.

**0:42:37.5 DO:** The other example that I wanna talk about really relates to this idea of being prepared to deal with difficult situations that may be triggering. I had a community that I was working with that really... They were on the ball, getting people involved even during the course of the workshop. We ran this workshop during the time where they were doing their Delta application, and they jumped right in to involve persons with lived experience in that process, which was excellent. But what occurred in that process was that they had persons with lived experience that they invited to join their ranking committee. And in the same way that every other person sits on their ranking committee, right? You're gonna read the application, you're gonna give it a score. We're gonna have a conversation about your scores based on the application. And then we're gonna rank everybody.

**0:43:29.7 DO:** However, when the persons with lived expertise joined the panel and they read the applications, what they really wanted to contribute wasn't so much a score based on what was on

paper. They wanted to contribute what was their experience with the program, which often didn't match up with what was on paper in the application. And that was very upsetting to them, that program was presenting themselves in a way that they didn't think was an accurate representation of the program. And then it was more upsetting that the process didn't really have a space for that. They were supposed to just score based on the application, what was on paper, just like everybody else. And their scores would go in with everyone else.

**0:44:13.1 DO:** So this last bullet point about the infrastructure, that maybe your infrastructure needs to change. They know in the future that they want to set up part of their NOFA process is a way that people can give input into the program based on their experience, that isn't really only about rating the application on the paper. And that that input can be accommodated and evaluated and integrated into the scoring process in a way that has nothing to do with the score that they received on the application. And it ended up being a really challenging experience for the community, both from the people who were coordinating the NOFA process and some of the persons with lived experience that joined it, because everybody ended up really frustrated. And they hadn't been prepared for that possibility. And so, one of the things that we took out of that was that it was important to talk with individuals about the fact that in this space there may be information that you hear that's upsetting to you and how are we gonna handle that. And they really adopted a mentorship model after that, so that there was a safe space for people to process and share those experiences that they might have been triggered by.

**0:45:37.0 LL:** Thanks so much, Jessie. And that actually brought to mind another example that I will raise here from communities I've worked with. Often, I think that people who are engaging in processes that weren't designed initially to have people with lived experience in them run into this issue where you realize this process or this thing was actually really offensive or triggering for the people with lived experience. Something that I often raise is the process of looking at data. So if you're a person who has lived experience, and the first time you ever look at data, and you aren't prepared for that in any way, you're gonna get hit with, "Oh crap, I'm just a number, and I statistically meet this thing that ended up homeless. I fell into this because I'm just a number," or you get... It's hard to not get hung up. And I've seen this happen lots of times when folks look at data for the first time.

**0:46:32.9 LL:** And so this is the point where, to my previous point, about training each other, right. This is an instance where y'all need to be able to learn from people with lived experience about how to do that process better, and someone needs to be doing the work of preparing them to look at that data and training them about how to read those numbers and how to understand the story it tells before just going into a conversation that could potentially be triggering or difficult for them. Another example I wanna raise for capacity building. In the last round, there were some communities who I worked with who are geographically right next to each other. Their boundaries are all touching. And so they actually decided to sign up for this workshop together. And that was a really cool thing to see, because they each had their own plans, they were each developing their own steps, but the capacity piece that came in, that they built in, was this ability to hold each other accountable and to plan things together and to learn from each other, and that's something that you don't necessarily have if you just work within your own bubble in your own community. So finding ways to partner with your neighboring geographical areas or even just partnering locally within your geographical area, but with other community partners in other places who can help hold each other accountable in this work.

**0:47:58.0 LL:** And that brings me into the accountability piece, okay? So that was about building the capacities for accountability. So accountability and sustainability. So in order to do this work, you need to define specific areas that shifts in power can occur. Sometimes this looks like that re-imagining leadership piece that we talked about in the beginning. Sometimes it's about being willing to revisit your bylaws and not be so rigid about what's in a contract. Developing transparency structures. So again, if people don't understand what the expectations are or what those structures are, they can't actually engage. If they don't know what their limits are, if they don't know what power you have to give them, they're gonna come up with some things that don't fall within the power that you have to give them, and all you're gonna be able to tell them is, "No, sorry, we can't do that." So you need to be really, really transparent about the things that you do have power to do and the things that you don't have power to do. And when you don't have power to do something, you need to be able to transparently connect folks and build that in. Don't hide things. Don't hide the contract, don't hide the information. If folks don't understand the boundaries they're working within, they can't help you.

**0:49:14.9 LL:** Developing community agreements. That's something that I think Maseta touched on earlier. You need to build those in all spaces that people with lived experience and the BIPOC community members can engage. That means that even if you have a private meeting that typically don't... People don't attend, you need to be practicing those community agreements. You need to be practicing using things like your pronouns and naming your race. You need to be practicing holding each other accountable, because then when you go and you actually are engaging with people with lived experience in other communities, you're going to be a lot better at it, and you're not gonna feel as clumsy about saying like, "Hey, that's not an okay thing to say. Can we think about different ways to communicate that?" Or like, "Hey, let's try and talk about this a little differently." Or, "Hey, that doesn't go with our community agreements."

**0:50:07.6 LL:** And you'll have to be able to develop policies and procedures that ensure all of the steps for the continuous feedback loop are accomplished. So what that means is that... I actually just explained this to the Massachusetts [0:50:23.0] \_\_\_\_\_ earlier today. So let me just use the example I used for them. The difference between a focus group and a youth action board meeting in this situation are that a focus group is a one-time thing. It's somebody who's got a clipboard who wants to learn some information, takes their list of questions, they gather some people, sometimes they pay them well, sometimes they just hand them a gift card. They ask a bunch of potentially invasive questions, and then they walk away with that information, and they just gather it all up and they go do their job better. And the people who are involved in that focus group get nothing more than the dinky gift card and snacks or whatever it was that day, right?

**0:51:08.7 LL:** But when you have a continuous feedback loop, right? And you have a group who's more like an action board or a group who's involved in the process, you might have some conversations that could potentially sound similar to focus groups. You might talk about some of the same things. The difference is that you don't just gather the information and run, you bring them into the process. So you might have that conversation and have a conversation where you can identify the gaps and things going wrong and the things going right. And then you'll say, Great, thank you. You'll put all that together in the note. Hopefully, you have some people with lived experience like pulling this information together with you. And then you come back and you say, "Hey, did I get this right? What else am I missing? What did I change?" So you're not just taking it and running, you're going through the whole loop. And finally, developing a power and decision-making structure that supports the accountability to community. And I'm gonna go to the examples.

**0:52:09.8 LL:** So the examples for this piece, infusing people with lived experience into all governing bodies, with sufficient support for them to be authentically engaged, changing the bylaws to require more than one seat specifically for people with lived experience and using the checks and balances, committees that are entirely made up of people with lived experience hold power to veto or change decisions, including funding decisions. And, for example, I'm handing that to Destiny first.

**0:52:46.8 DO:** Great. And several ways to end this... This can be done on a lot of different ways. A lot of communities come into the workshop thinking that what their ultimate goal is, is they wanna leave the workshop with all these plans to develop a consumer advisory board, right? Like that's often what people tell us on their first workshop. And through the course of the workshop, a lot of community switch to thinking about wanting to implement ways that they can integrate persons with lived expertise within to their system structures that is not a separate stand-alone body. So that could look like setting aside a certain number of spots.

**0:53:26.8 DO:** One of the communities that I worked with decided that they wanted a third of all of their committees, so their board, all of their... Like their coordinated entry advisory committee, their HMIS committee. They wanted all of those committees, a third of the participants to be persons with lived expertise. They changed their charter to reflect that. So that's the thing about building in the structural pieces to ensure that you have accountability in doing that. And then speaking about the community that I used for an example, that has additional time with their NOFA process. Well, that was a challenging experience and they learned a lot from it. They're committed to continuing to do that. Because the reality is, is that in our system, money is power, and so really having the ability to make decisions about where money goes and which programs get funded, that's a real powerful place to be in the system. And so thinking about where are those opportunities that you can make changes to your structure that really institutionalize sharing power with persons with lived expertise.

**0:54:43.7 LL:** Maseta, you're up next.

**0:54:50.1 Maseta:** Yeah, thank you, Lauren. I'm remembering a living example that kinda helped to ensure that all persons of lived experience were involved in all of the governing bodies and specifically with the Balance of States, right? So then what they did was they didn't just wanna stop with ensuring that folks with lived experience were on their Balance of State board of directors, they also wanted to make sure that at the regional coalition, for instance, I think they were split into 13 or 14 regions, that there was an infusement of partnership, authentic partnership at the regional committee within their each of their specific areas. So the model that they did within the Balance of State and infusing... And partnering of persons of lived experience, they said, "We are going to put this on paper and then share it with each of our regional committees and ensure that along with the overall statewide Balance of State that regionally each local Homeless Coalition is a reflection of the structure that we have created here at the Balance of State." And so not only was partnership done at the top, it was also being done in different counties, which I thought that was really, really effective to ensure that the entire region is covered with authentic partnerships.

**0:56:25.0 LL:** And thanks so much both of you. So that is the end of my section. I just want to apologize again for the technical difficulties and getting tripped up by that and I'm gonna hand you over to Dusty. Thank you.

**0:56:42.5 DO:** Okay, I'm gonna finish us off with a little bit about ensuring that we're using our time and space when we're engaging with the persons with lived expertise to take advantage of teachable moments. Oh goodness, I don't know what happened to that slide. [chuckle] So one of the things that we really like to normalize in this work is that we are all in a learning space, we are all here and to do better and to make mistakes. And even Masetta and Lauren and I as the facilitators in these workshops, we still make mistakes. We definitely don't know everything. And so we like to create a culture where learning is the expectation and the norm. And one of the ways that we try to do that is to create space for teachable moments. So we're gonna talk a little bit about what those are and how you can do that.

**0:57:41.9 DO:** So a teachable moment is an unplanned opportunity to provide information, promote discussion and provide additional insight. So maybe it is not exactly what you intended to present, but there's an opportunity to deviate from the agenda because the moment has presented itself where it is going to provide additional learning and support and opportunities for people to dive in deeper into the discussion. So sometimes it happens very fortuitously and it's exactly where you want it to go anyway. But often it is something that kind of comes out of the blue and you need to be prepared to stop and say, "Whatever it is that we were going to do is really important, but this is more important. Taking the opportunity to really learn from this situation is essential."

**0:58:41.5 DO:** Actually, let me go back. And let me give you an example. So we had talked about community agreements, and Masetta talked about community agreements. And one of the things that we had not done in one of the workshops was really set strong community agreements that supported these teachable moments. And so, we had a situation where a participant was frustrated at their experience, and they were expressing some frustration, and the way they expressed their frustration was potentially hurtful and harmful to some of the other participants. Particularly, the participants with lived experience that were in the workshop. And so, we stopped and we used that as an opportunity to talk about, "How do you handle it when a situation occurs, and there's harm in the moment?" And, that only came up because of what somebody said. It was absolutely what we were trying to talk about in the workshop, but it wasn't what we had intended to go into in that moment.

**0:59:54.2 DO:** But it gave us an opportunity. But, the learning moment for us was that we had not set up with the group in advance that when those moments occurred, we were gonna stop and take care of them, and address them. And so, that was a learning moment for us. And so, now in the workshops we talk about the fact that there may be times where we stop the agenda, because there's something that has occurred that we have to talk about and we're gonna use those things as examples. And, I feel calling in versus calling out is really important in that. Because, when something occurs in the moment or somebody does something or says something that is potentially causing harm to someone else. How do we respond to that? How do we deal with it? We do have a culture right now, particularly of calling people out. But it's important to think about, when you call someone out, when you use that phrase or that idea of calling someone out, often the point is to shame them for their behavior.

**1:00:53.2 DO:** And what we know about human nature is that when people are shamed, they disengage and they usually can't learn in that space. And they're less likely to engage in the future. What you don't want when you're trying to bring everybody together in partnership, is a place where people are fearful of doing or saying the wrong thing because it comes with shame and

embarrassment. And so, really thinking about shifting to calling in. Often, when you hear about the difference between calling in and calling out, this idea that calling in is only done in private is often the defining characteristic. I challenge that a little bit, and there's a number of resources that challenge that. It is possible to address things in public that cause harm and still do it in a way that is the nature of calling in.

**1:01:51.5 DO:** Calling in is really about explaining to somebody what the error was, what the impact of that error was, but doing it in a way that is from a place of compassion and patience with an individual who's in a learning space, because we are all in a learning space in this work. And it's done with the intention of learning. It's designed to help grow the relationship with the individual, not to degrade it, which calling out usually degrades that relationship. And it's from a place of mutual respect. Most of the time, people who do this work have the best of intentions, that doesn't mean they're always perfect and they definitely make mistakes. But, acknowledging that they didn't probably intend to be harmful, but that doesn't mean you don't address the harm. And so, when harm occurs in public, addressing it in public can demonstrate support for those who are harmed and create a safer space for them. So if you are engaging with persons with lived experience in your system planning or in your work, and in a meeting something comes up that is hurtful for them, addressing it in public in a compassionate and patient learning way, right? But it still demonstrates support for them. They were harmed in public, so addressing it in public is an appropriate response. As long as it's done more from a way that is about learning from the mistake and demonstrating allyship than about shaming and blaming.

**1:03:26.6 DO:** So when you create a space for shared learning so that everybody is learning together... Lauren talked about training. We often think about when we are engaging persons with lived experience, it's about, "Oh, before we start, we gotta train them up." So that they can come into the space in a way that works for everybody that's in the space. That's not what we're talking about here. We're talking about a space of shared learning. Because well, persons with lived expertise may need some technical components. They're coming into the space because they are an expert in your system. So they don't need training up to be that. They may need some technical training. The people that are already in the space, that are in historical roles of leadership, they may need some training too. Maybe they don't need the technical training, but they need some training, maybe on racial equity. They might need some training on trauma-informed response. They might need some training on other pieces of this work that can help them partner better with persons with lived experience, so we really wanna talk about a shared space for learning.

**1:04:35.2 DO:** So you wanna establish a climate of openness and respect. You wanna ensure that your community agreements acknowledge that mistakes are gonna be made, and that mis-steps are learning opportunities. And everybody from the get-go buys into that idea that we are learning together. And being mindful of intent versus impact of people who work in social services, like I said, they probably didn't intend to be hurtful or harmful. They probably had good intent, but that doesn't mean their impact wasn't hurtful or harmful, and impact is what we want to address because good intent doesn't negate bad impact, and so acknowledging those things in the community agreements can really set yourselves up for an environment where everybody can learn together. One of the things that can be included in a community agreement is this idea of a "Oops, Ouch and Whoa method."

**1:05:37.0 DO:** And you may have heard of this before, but if you set it up in advance, this is something that's hard to do on the fly, when the harm has occurred, but if it's set up in advance, it

gives the opportunity for people to express their feelings in a way that everybody's agreed to. So Oops is "You know what? That hurt me, like what you just said, what you just did, or what just happened here was painful for me, and I need to talk about it, I wanna acknowledge that it was painful and I need to state that." Oh, sorry, that's ouch. I went backwards.

**1:06:13.9 DO:** So Oops is I said something and it landed wrong. "I didn't mean it to come out that way, I'm sorry that it was hurtful." Everybody has said something in a meeting, I know I have said something in a meeting where I'm like... After I say it, I'm like, "Oh, that's not really what I wanted to say, that I couldn't figure out how to frame it right." That's the Oops. Ouch is the one that I started with, which is really about. "That was hurtful to me and I wanna talk about it." And Whoa could be done by anybody. Whoa is, "We need to stop." It can be that teachable moment where it was like, "Hey, we're gonna stop the conversation and we're gonna pivot, maybe we're gonna address an Oops or an Ouch, or we need to stop because people are miscommunicating here, and it's becoming more about emotions than it's becoming about learning.

**1:07:12.4 DO:** Or we just need to dive in." So that's an agreement that you wanna have. Now as the meeting facilitator, if you're the facilitator of the meeting, you can help set the climate and the culture for that through the community agreements, but you can also set the climate and culture by making sure that there is space and time and that when somebody has a moment, helping them sort of pause the conversation or stop that. Maybe you can look and see like and say like, "Hey, it feels a little like there was an Ouch that just happened."

**1:07:51.3 Maseta:** Didn't happen to me as the facilitator, right. But I can feel that it happened to people in the group and give a safe space for them to be able to talk about that harm, even if that's not something they're completely comfortable with. The other way that you can provide space for shared learning is provide all the participants the opportunity to direct their own learning by actively setting the agenda. Setting the agenda for a meeting is really a place of power, particularly if you are ongoing in your engagement with persons of with expertise. If I get to set the agenda every time, it means that I'm only getting the information that I think I want, the things that I want to hear. But if the people that I am engaging with are setting the agenda, they get to direct the opportunity.

**1:08:42.2 DO:** Like Maseta 's example that her community gave, where whenever they met with her for their one on one TA, the individuals with lived experience, are the ones who got to say, "This is what we're gonna talk about in this one-on-one technical assistance opportunity." That is a huge way to shift power, but it's also a great way to create space for shared learning and authentic engagement, because it allows them to direct what it is that they want to talk about, and then you wanna develop skills for engaging in difficult conversations. There's lots of resources, Critical Conversations or Crucial Conversations is a great one, so there's a lot of other things for developing difficult conversations, because these are painful things to talk about.

**1:09:25.5 DO:** And Jen mentioned in the chat way back that a community agreement doesn't necessarily have to be about everybody feeling safe, if the definition of safe is I'm never uncomfortable. Being uncomfortable is part of learning. And so when you're setting a space for shared learning, acknowledging that often in the discomfort is where the greatest learning happens, pushing into that edge, and so having difficult conversations about something that is hurtful, having difficult conversations about racial disparity or systemic bias or institutional racism that are really all things that are ingrained in our system that we need to be able to talk about, those can be

difficult to talk about, and they can be difficult to be engaged in those conversations, and so that's a muscle that we have to learn to flex and have that, but uncomfortable is not bad. Uncomfortable is where the learning happens.

**1:10:27.4 DO:** The other thing that you wanna make sure that you are taking into account is differences in culture. Culture can come from a lot of places. We generally tend to think about race and ethnicity when we think about culture, but it can also be gender, region, organizational structure. Lots of things contribute to culture and cultural differences can impact people's response to the things that occur, to the mistakes that happen, to the conflict that comes up, to having difficult conversations. And as a facilitator, when you are engaging in groups that has people from lots of different experiences and backgrounds, that has to be taken into account. And so it's helpful to learn about that. We have... Maseta, Lauren and I had a great conversation, and we had several great conversations about this. We are all from very different parts of the country. Maseta is from the South, I am from the Pacific Northwest, and Lauren is from the Northeast.

**1:11:23.2 DO:** And we've had great conversations about whether or not you address difficult things in public or in private as facilitators, and where I come from in the Pacific Northwest, we are pretty straightforward, and I shared that when I had been in a meeting, if something harmful had happened, and I was going to pause as the facilitator often times before I even had a chance as the facilitator to pause the meeting, somebody else was jumping in to say like, "Hey, that was a harmful thing that just happened and I think we need to talk about it." Maseta shared with me that in her region, that is not how conflict is handled, right? It is handled after the meeting, in private, one on one. And that's a regional difference that we also had to learn to manage as co-facilitators. So those are the kinds of things that can come up within your meeting space, that you have to work through both as participants and as facilitators. Okay. We've had great Q&A come in through the chat, and so I'm gonna turn it over to Alisa, to help us moderate that.

**1:12:40.9 AP:** Great. Thank you and just a quick praise, y'all are amazing navigating through all the text, so glad we're all here at this point. I don't know that we'll get through all the questions, but we will try. So the first one is, that came through is, "Some of the regions our unit funds serve primarily White folks. So how do they ensure that folks of color with lived experience are still engaged in ways that are meaningful and truly collaborative, if the region's racial makeup is over 90% White?"

**1:13:19.1 DO:** I would say that, if you're still seeing the same statistic in the people you're serving, you might not be finding all of the people who are experiencing homelessness. And there can be lots of different reasons for that, right? Maybe in a White dominant space, they don't feel comfortable reaching out for help. That can be a cultural thing or a safety thing. But I think that, it is nationally people who have... People... Sorry, blah, I can't talk. BIPOC people, Black people, indigenous people, experience homelessness and housing instability at a higher rate. And so you have them in your system. Whether you're finding them or not, that's a different question. But, you should be trying to bring leadership in that reflects those people so that you can be making sure they feel safe and they feel comfortable accessing those resources too. Maseta, actually do you wanna add anything to that?

**1:14:20.9 Maseta:** The other thing that I would add to that, really has to do with also thinking outside of your system. And I think this is a good recruitment tool in general, but particularly when we're talking about, BIPOC individuals or other communities that may not feel comfortable

accessing mainstream services, is what I call periphery recruiting. Which is, what are the agencies and services in communities that are not homelessness, they're not specific to homelessness, they may not be in your system, but are probably serving a whole lot of people experiencing homelessness within their community. And that is an excellent place to recruit, for persons with lived expertise, to engage in these processes for several reasons. One, they're representative of who's more likely to be experiencing homelessness in a community. But two...

**1:15:11.0 Masetta:** They may have a completely different perspective because they're not engaging in your system, which is something that you wanna hear just as much as people who are engaging in your system. Thinking about recruiting outside, maybe it's culturally specific organizations that are crisis organizations, but not homelessness. Or religious organizations, that it's part of their mission to help people in crisis or to help their community. And maybe homelessness isn't any word in any of those spaces, but they're serving a lot of people who are experiencing homelessness. One of the best organizations I can give an example for, are like, Transgender and LGBTQ advocacy organizations. We know that that community experiences homelessness at incredibly disproportional rates, and people that are experiencing homelessness are accessing their services all the time, that may not be coming into our programming because they're not comfortable with that. Those are great places to recruit outside of your normal thought process.

**1:16:15.0 LL:** Yeah. I wanna plus one with what Dusty said, because I found that, as a personal experience, to be highly valuable when you're going outside of the norms of housing programs and organizations. And, getting outside of that parameter, because especially if your data still reflects a high influx of persons of lived experience, who are of the Black indigenous or people of color. So it's happening, and they're living in the community and they're touching different point base, and there is value in going outside of the homeless program and reaching to other social service providers. Like, the YWCA, like social mental health services, like local hospitals that have social work programs like the emergency rooms and different things like that. And you can't not reach out to faith-based organization who, although they may not enter input into the system, they still have a high connectivity to that specific population. Because culturally, if that is a high area that is value within the certain group, then that is the networking that you can reach, you can use to help you with your authentic outreach.

**1:17:35.5 AP:** Perfect. Thank you. I would also real quickly since we're talking about data, and we all know how much I love data, plus one on what Lauren said around your system, HMIS, specifically around using that data, I will use an "I" statement here. Historically, if the data shows an under-representation of a specific race or ethnicity or gender identity group, I think I have just assumed that that means that they don't need to access those services that we are providing through our homeless response system. But unless we fully interrogate that, we can't assume anything, so pulling in those external partners and external resources is going to be really helpful to interrogate that.

**1:18:22.5 AP:** Okay, next question. What tax designation is appropriate for lived experience participants in order to pay them for their expertise? Also, are there payment methods preferred based on accounting best practices, and convenience for the participants?

**1:18:37.2 DO:** My favorite question. Okay. And so this really depends a lot on the structure that you have in your community. What I most recommend is that you hire young people... Oh, sorry. I'm used to young people... That you hire people in general who have lived experience to work with

you. And that you not pay them minimum wage, that you pay them a thriving, really fantastic rate that allows them to prioritize working with you. The reason for that is because if you just pay folks a stipend, then that has to be taxed once you hit that \$600 mark, no matter whether it's been in cash, gift cards, or what... That has to be reported. And then the people who you've paid are responsible for paying taxes on that.

**1:19:23.6 DO:** So now some communities will decide to designate folks as consultants without doing a lot of research about what it means to be a consultant or what the IRS considers a consultant. And I just wanna preface all of this and say, I am not a tax expert, this is all stuff that I've learned along the way in dealing with and navigating paying folks for their time. So y'all should do your own research and look all this up. But if you Google employee versus consultant, then a lot of this information will come up. Or if you Google employee versus consultant IRS. Remember that term and look that up later. And that'll help you figure out what kind of a designation you need to classify folks as.

**1:20:06.4 DO:** If you have folks who are able to fully do work on their own, they don't need any support, you don't have to tell them what time to join meetings or any of that, then you can classify them as a consultant. Make sure you pay them an actual consulting rate though. \$15 an hour is not a consulting rate. Consulting rates in our field... Like the low end is \$75, the high end can go all the way up to \$200 or something crazy. And so have an understanding about what the market is for consultants and don't label someone a consultant, if they aren't fully consenting to be a consultant, and understanding what the market rates are for consultants. And they need to understand taxes. If someone's a consultant, they also need to understand how to set aside taxes. So they have to have a certain amount of financial literacy.

**1:20:55.8 DO:** And if you have mis-classified somebody as a contractor or a consultant then you can actually get reported to the IRS. And then not only does that person that you're paying get a slap on the wrist, but you now also owe a bunch of fines and fees as well. So again, I'm not a tax expert, but I do know that folks have been kicked in the gut for that in the past. I've witnessed it. Please do your research so that you have an understanding. And please be aware that there's not a way around that. Anything that is called a reimbursement or any of these other funny things that's actually tax evasion and it's a really tricky thing, and you don't wanna get kicked for it.

**1:21:34.7 DO:** What you do want is to have people who are fully engaged, fully supported, have a go-to person, whether you technically call that a supervisor or just a supporter in your hierarchal structure, in your organization... Whatever that is. And are training them to be able to do the work and have access to the tools that you also have access to. And what that ultimately looks like when you're really truly engaging folks is an employee. They should be employed by you. They should be able to be really truly ingrained into what you're doing. Yeah. That's what I have to say about that.

**1:22:14.5 DO:** Lauren, I just... That's so great. I just wanna add in regards to tax for those who do self elect to be represented as a consultant, that there are free resources in communities. A majority of communities that provide tax support for those in preparation of taxes and different things like that, that a person with lived experience can qualify for based on your recommendation and connection. And that's all part of providing back end and support, that can be a robust way of allowing them to self-choose, how they would like to be compensated. So there is a way to be able to do that as Lauren provided all of those options. And don't feel fear when you hear, "Oh taxes, and I have to do this." There are free resources for tax support for individuals of certain income and

housing situations.

**1:23:11.8 AP:** Yeah, thank you Dusty.

**1:23:12.7 Maseta:** I don't know...

**1:23:13.2 AP:** I'm so sorry, Maseta.

[chuckle]

**1:23:14.6 Maseta:** No... I'm gonna wrap this up and try to answer one other question that kind of piggybacks on this a little bit. And really talk a little bit about the importance of understanding those implications when you're developing your compensation plan and... So somebody put in the chat like we... People preferred a way of payment with gift cards because then they didn't have to report it against their benefit. That's actually not true. Once you get above the \$600, you have to report it, even if they paid you in a Target gift card... If you got more than \$600.

**1:23:51.4 DO:** Exactly.

**1:23:52.3 Maseta:** So it's important that us in the... That we in the system really understand those things and can make sure that we're informing people so that they can make a good decision about their compensation plan. But somebody asked this question about budget. And I think the important thing that I wanna end with here is the idea that we pay for those things that we value. And so we would encourage you to think about setting up your budget, not engaging persons with lived expertise within your budget, but setting up your budget for the people with lived expertise that you need to engage. So if you're gonna put together a group of 10, 15, 20 people, which is what you probably need to have diverse perspectives, because people experiencing homelessness are not homogeneous. And you're gonna pay them a decent rate of \$25, \$30 an hour, and you're gonna pay that every time they meet, or do work for you, and you're gonna engage them authentically within your system, that is going to be expensive.

**1:25:00.2 Maseta:** So saying I have \$2000 for engagement and how many people can I engage, isn't necessarily the right approach. It is, what do I need to get authentic engagement? How much is that going to realistically cost me? And then where do I find the money to pay for that? Whether that's philanthropy, or unrestricted funds, or donations, lots of things. But try not to let the budget constrict authentic engagement as much as possible. And we are just about at time. Alisa, you wanna close us out?

**1:25:42.7 AP:** Yeah, we just wanna take a minute to thank everyone for being here with us today, and hope that some of these lessons will help... And the lessons learned will help with you all as you move forward or continue your journey, and in meaningfully and authentically engaging people so they experience into your processes. Maseta, Dusty, Lauren, thank you so much for all of your knowledge and expertise and sharing that with all of us, and navigating through.