



RECRUITMENT COMMUNITY WORKSHEET

Template for People with Lived Experience and Expertise of Homelessness

PURPOSE

This document is designed to help your Continuum of Care (CoC) recruit people with lived experience and expertise of homelessness (PLEE), as well as CoC staff, and local providers. The tool provides considerations and questions for recruiters, CoC staff, and local providers to work through both before and during the recruitment phase of a PLEE engagement project.

Reviewing and answering the questions in this tool can help guide communication and collaborative efforts with PLEE to ensure everyone involved has a clear understanding of expectations and next steps for the engagement.

HOW TO USE THIS TOOL

This tool can be used by an individual group or in collaboration with community partners while working through different phases of PLEE recruitment. There are five sections. Each section contains two tables. Table 1 contains CoC consideration points and Table 2 contains questions for PLEE partners. For Table 1, the questions listed in the CoC Consideration Points column are meant to provide CoCs with a framework to proactively respond to potential PLEE concerns about the engagement. Examples for actions CoCs can take for the consideration points are included. Listed resources are meant to represent best practices for PLEE engagement.

For Table 2, CoCs can use the questions listed in the "Questions for PLEE Partners" column to dig deeper into PLEE needs, concerns, and suggestions related to the engagement. We encourage CoCs to work with PLEE to **fill out** the "Identified Ideas, Needs, and Solutions" column based on participants' responses to directed questions. Each participant will bring their own unique perspective and set of needs to the engagement. It's possible the CoC does not yet have a process to meet those individual needs or did not realize a specific resource was needed. This column provides a space for recruiters, CoC staff, and local providers to work together with PLEE to find solutions. CoCs should also write down any suggestions and ideas PLEE may have about the engagement. The feedback could spark further discussions, prompt improvements, and positively influence the course of the engagement. CoCs and PLEE should take note and identify individuals or groups responsible for completing any associated tasks for specific needs and suggestions in the "Follow-Up and Responsible Party" column.

SECTION 1: SETTING EXPECTATIONS FOR THE ENGAGEMENT

Establishing an open and transparent dialogue is crucial to building strong partnerships. Setting expectations about the engagement is critical when building a collaborative partnership with PLEE. They likely have questions about project timelines, outcomes, roles, and potential impacts of the project.

The CoC consideration points in the following table may help CoCs address PLEE concerns related to:

- What the engagement is about?
- How much time (in hours or days) will they are expected to give during the engagement?
- When the engagement begins and ends?
- When, where, and how participants can participate and if those options are flexible?
- What their role in the engagement can and will be?
- Whether PLEE will be making decisions on policies or practices based on data from the project?
- Whether the engagement will lead to direct changes in the homeless response system?
- If there are opportunities to have a bigger role in this project or within the CoC?

Table 1: CoC Considerations: Setting Expectations for the Engagement

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
What prompted the CoC to start this engagement?	<ul style="list-style-type: none"> • The CoC is interested in exploring systems and other local data to answer specific questions about the homeless response system. • The CoC wants to address inequities and unfair practices in the homeless response system. 	<p>Guidance for Recruiting, Hiring, and Retaining People with Lived Experience and Expertise of Homelessness</p> <p>COVID-19 Homeless System Response: Engaging Individuals with Lived Expertise</p> <p>Partnering with Persons with Lived Experience Lessons Learned Webinar</p>
How will the CoC approach PLEE individuals or groups for the engagement?	<ul style="list-style-type: none"> • Providers identify potential PLEE who have expressed concern or interest in provider or CoC operations. • An interested (and compensated) PLEE peer mentor posts fliers in a waiting room or a neutral space or does one-on-one outreach to recruit others for current or future engagements. • If hiring for a staff position, the CoC 	<p>A Quick Guide on Consumer Engagement in Governance of Health Care for the Homeless Projects</p>

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
	<p>uses employment services, job programs, groups, and organizations connecting with people with the lived experience and expertise of homelessness seeking employment.</p>	
<p>Is it a person previously served by the homeless response system, or a representative of the population served?</p>	<ul style="list-style-type: none"> ● The individual may have gone through the CoC's homeless response system or through another homeless response system. ● The individual may be someone with very recent experience of homelessness or someone who experienced homelessness several years ago. 	
<p>How is this person's expertise or experience being incorporated into decision making?</p>	<ul style="list-style-type: none"> ● The CoC designs PLEE roles that make direct decisions on local policies or practices about the homeless response system based on their expertise and personal experience with the system. ● PLEE may not be making direct decisions on local policies or practices, but their feedback is presented to a separate group of decision makers. 	
<p>Approximately how much time (in hours per days) will PLEE be expected to participate in this engagement?</p>	<ul style="list-style-type: none"> ● PLEE engagements can be brief and time-limited such as spending a few hours in a listening session or filling out a survey. ● Medium to long-term PLEE engagements can last weeks or 	

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
	<p>months with meetings and check-ins spread out at regular intervals.</p> <ul style="list-style-type: none"> • Long-term engagements can include having PLEE sitting on the CoC board, committees, or workgroups, or being hired as staff. 	
<p>What role are you wanting participants to take during this engagement?</p>	<ul style="list-style-type: none"> • Roles for an engagement can include participating in or leading listening sessions, conducting surveys, providing peer support to other PLEE, analyzing CoC data, evaluating CoC policies, working part-time or full-time as staff, becoming engaged in CoC committees or working groups, or being a member on the Board of Directors or CoC. • Refer to Recruitment and Compensation Overview document for list of roles, descriptions and potential duties. 	
<p>What opportunities are there for PLEE to create pathways into other roles within the CoC either through this engagement or through other means?</p>	<ul style="list-style-type: none"> • CoCs that have existing pathways for staff to get certifications or trainings can open up those pathways to PLEE to promote PLEE advancement into other positions or roles within the CoC. • The CoC creates and supports a role for PLEE partner(s) to recruit peers for other CoC engagements. • The CoC alerts PLEE when there are staff openings within the CoC. 	

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
<p>Is the CoC's meeting schedule realistic, providing flexible meeting times and days and a variety of ways for PLEE to participate (in-person, virtually, in writing, or through social media)?</p>	<ul style="list-style-type: none"> • The CoC solicits suggestions from PLEE about meeting times, locations, and ways to participate that would work best for them. • The CoC develops more than one meeting schedule and lets PLEE vote on which schedule works best. • The CoC provides the opportunity to join meetings virtually, and/or hold meeting times outside of business hours to accommodate when PLEE can attend. 	

Table 2: Questions for PLEE: Setting Expectations for the Engagement

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
<p>Are you looking for opportunities to create a pathway into other roles within the CoC?</p>		
<p>What would successful, meaningful participation look like to you?</p>		
<p>How would you prefer to participate in this engagement (in-person, virtually, in writing, through social media, etc.)?</p>		
<p>What days and times work best for you to meet?</p>		

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
Do you need flexible meeting times or other ways to participate other than in-person?		
How much time do you feel you could commit to participating in this project?		
What are your preferred methods of communication?		

SECTION 2: ACKNOWLEDGING EMOTIONAL LABOR

For people with lived experience, partnering with CoCs or local providers for an engagement can be emotionally difficult. For CoCs, it's important to acknowledge this emotional labor and provide space for people with lived experience to experience these emotions during the engagement. The consideration points below will help establish:

- How the CoC will make sure the engagement is a safe environment for PLEE to share their experiences?
- Whether emotional support will be provided for participants?
- Whether the emotional support provided by the CoCs is led by someone who has experienced homelessness?

Table 3: CoC Considerations: Acknowledging Emotional Labor

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
<p>How are you engaging PLEE without re-traumatization, exploitation, and tokenization?</p>	<ul style="list-style-type: none"> • The CoC creates a space for people to react, process, and contextualize information. For example, numbers represent people, those people are in the PLEE's community, and talking about the "numbers" without "the people" may cause harm and further disenfranchise people. • The CoC ensures that the creation of this project or committee is not simply checking a "Diversity box," but outlines the boundaries for which PLEE will be decision makers and how their voices will be heard and effect change. • Be clear that while you are leveraging their perspectives and experiences, you are not asking PLEE to speak for all people experiencing homelessness. 	<p>Staff Orientation to Racial Equity</p> <p>Tips for Peer Support Specialist Programs</p> <p>SAMHSA's Concept of Trauma and Guidance for a Trauma-Informed Approach</p> <p>COVID-19 Homeless System Response: Peer Support</p>

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
<p>Will your CoC provide Cultural Humility Trainings, and Racial Equity Trainings to CoC staff in order to conduct equitable and appropriate engagement with communities?</p>	<ul style="list-style-type: none"> ● Institute a Racial Equity Team to develop core values, goals, and accountability procedures that can be integrated into broader CoC goals. This team should be open to PLEE participation and feedback. ● The CoC provides annual training with quarterly equity working group meetings to monitor and improve the implementation of training principles for all CoC staff. ● Open up CoC Racial Equity Training to PLEE both to participate and to provide feedback. 	
<p>Have you identified an individual or group to emotionally support PLEE in the event they have questions or challenges along the way?</p>	<ul style="list-style-type: none"> ● Identify, train, and support a PLEE partner to serve as a peer mentor who provides emotional support to other PLEE during the engagement. ● If emotional support is not directly led by someone with lived experience, get feedback from PLEE on emotional support practices. 	
<p>Is the emotional support led or informed by someone with lived experience of homelessness?</p>		

Table 4: Questions for PLEE: Acknowledging Emotional Labor

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
<p>What are some steps you feel the CoC should take to support PLEE like yourself and create a safer environment for participation? Some resources the CoC can provide include (adjust the list below as necessary):</p> <ul style="list-style-type: none"> ● Childcare ● Transportation ● Quiet study rooms ● Meeting locations that are accessible for mobility devices ● Access to staff bathrooms ● Access to gender neutral bathrooms ● Access to a mental health professional 		
<p>How would you personally like to be supported as you work on this project with us? (Adjust the list below as necessary.)</p> <ul style="list-style-type: none"> ● Access to the same racial equity training that CoC staff receive ● Options to participate in the engagement anonymously ● Regular check-ins with the engagement lead to take the “emotional pulse” of PLEE 		

SECTION 3: ONBOARDING SUPPORT AND ONGOING RESOURCES FOR PARTICIPATION

CoCs should create an on-boarding and support process tailored to each participant’s needs. There may also be hurdles to full, meaningful PLEE participation due to transportation, child care, technology, and accessibility needs. The consideration points in this section focus on onboarding and offered resources and supports and should answer:

- Whether the CoC will provide information about data and the CoC before the project starts?
- What kinds of background materials are available to PLEE before work starts on the project?
- What resources the CoC has for transportation, child care, technology assistance, and mental health, etc.?
- Whether there are other ways for PLEE to participate?
- Are there different days and times that PLEE can choose to participate?

Table 5: CoC Considerations: Onboarding Support and Ongoing Resources for Participation

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
Will the CoC provide detailed orientation, background, or preparation materials for PLEE before the engagement begins?	<ul style="list-style-type: none"> • CoCs can use the Orientation and Onboarding slide deck to create a custom onboarding presentation for data projects. • If recruiting PLEE Partners to sit on the CoC Board or a special committee, provide a neutral and safe space for potential members to have a conversation with current board members to gain insight into the structure and process before the engagement begins. 	Methods and Emerging Strategies to Engage People with Lived Experience What Does it Look Like to Equitably Engage People with Lived Experience? Accessible Information Exchange: Your Market Meeting on a Level Playing Field
If there are in-person meetings, is the meeting space physically accessible for	<ul style="list-style-type: none"> • CoC and PLEE choose to use a library 	

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
someone with mobility devices?	<p>room because the CoC offices are more difficult to access.</p> <ul style="list-style-type: none"> When possible, the CoC provides a map (in physical, digital, or audio formats) of the meeting location and the meeting space with accessible elements such as routes to building entrances from public transit or parking, drop-off areas, route to meeting room, the layout of the meeting room itself, and bathrooms. 	
In terms of other types of accessibility, are the resources and orientation materials available in a format that is accessible to those who have seeing or hearing impairments?	<ul style="list-style-type: none"> The CoC makes presentations and handouts available in both audio and visual formats The CoC has made 1-on-1 staff support to work through the material at one's own pace available to all participants. 	
Does this person or group have access to the engagement materials to actively contribute to conversations?	<ul style="list-style-type: none"> Materials are given one week before each meeting takes place and meeting space and additional copies are available one hour before the meeting for PLEE to review. PLEE are sent regular reminders before the meeting time with information about what materials to use and how to access the materials. 	
Will the CoC be able to provide additional resources like child care, transportation, technology assistance, or mental health services, etc., for PLEE who need that	<ul style="list-style-type: none"> If funds are available, the CoC provides rideshares for participants. The CoC sets meeting locations close 	

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
support in order to fully participate in the engagement?	<p>to public transit locations.</p> <ul style="list-style-type: none"> • The CoC sets meeting locations at places PLEE are already familiar and comfortable with. • The CoC sets meetings at a library that offers free computer use. 	

Table 6: Questions for PLEE: Onboarding Support and Ongoing Resources for Participation

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
<ul style="list-style-type: none"> • Do you have transportation to and from in-person meetings or would you need transportation assistance? 		
<ul style="list-style-type: none"> • Do you need child care assistance for in-person meeting attendance? 		
<ul style="list-style-type: none"> • Do you have a stable internet connection and a source of technology to access virtual meetings? 		

SECTION 4: COMPENSATION FOR PLEE

People need to be paid fairly for their work. In the past, persons with lived experience have been expected to donate or volunteer their time while others around the table are paid. CoCs should be clear and upfront about payment to PLEE before the work begins. There should also be discussions about when and how PLEE prefer to be paid. These conversations are especially important if PLEE have concerns about how payments may have tax implications or affect their eligibility for public benefits.

PLEE may have the following questions about compensation:

- How much PLEE can expect to get paid for their work on the project?
- Whether there are different ways PLEE can receive payment for their work on the project?
- Who is the point of contact for PLEE if they have questions about payment affecting their benefits?

Table 7: CoC Considerations: Compensation for PLEE

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
<p>What methods can the CoC use to ensure PLEE are reliably and fairly compensated for their work?</p>	<ul style="list-style-type: none"> • The CoC works with their finance team to understand the internal controls required for stipend distribution (e.g., signed receipts). • The CoC creates an internal stipend policy that details the required documentation and steps for approval. • The CoC minimizes the amount of paperwork PLEE must complete to receive compensation (e.g., have staff pre-fill tracker with meeting attendance and known activities and then have PLEE verify for completeness and accuracy) • The CoC develops a consistent 	<p>COVID-19 Homeless System Response: Paying People with Lived Experience and Expertise</p> <p>Fair and Equitable Compensation: Foundation for HR Programs</p>

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
	<p>schedule for payments.</p>	
<p>What are the compensation rates the CoC is providing PLEE?</p>	<ul style="list-style-type: none"> ● Compensation should be provided for any training, orientation, and capacity-building needed so that individuals feel like they are adequately prepared to contribute and engage in the work. Time spent by PLEE on preparation for the work (including but not limited to reading background materials, watching videos, prework research, etc.) should also be compensated. ● The CoC discusses compensation upfront with PLEE before engagement work begins and includes information about how they reached the compensation rates. ● Refer to the CoC Facing Compensation Document for more information. 	
<p>Are compensation rates different for different PLEE roles in the engagement?</p>		
<p>Are compensation rates at industry standard for the role(s) PLEE are asked to fill during the engagement (consultant, trainer, researcher, TA provider, or staff, etc.)?</p>		
<p>Have you discussed compensation with PLEE before work on the engagement begins?</p>		
<p>Is there someone who can assist PLEE if they have questions or concerns about compensation from the engagement, including if PLEE are concerned about payment affecting their benefits?</p>	<ul style="list-style-type: none"> ● The CoC has someone on the finance team who is familiar with reimbursement options and can speak to payment schedules and limitations. ● The CoC connects PLEE to IRS Volunteer Income Tax Assistance (VITA) locations if they have questions regarding their federal taxes or encourage them to talk through any concerns about the earned income impacting their benefits, with their case managers or benefits coordinator. 	

Table 8: Questions for PLEE Partners: Compensation for PLEE

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
How would you prefer to be paid for your time on this project (check, CashApp, prepaid card, etc.)?		
Do you have any questions or concerns about how compensation may impact any benefits you currently receive?		

SECTION 5: NOTIFYING PLEE OF THE FINAL RESULTS

All participants, no matter their level of involvement, should receive information about how their feedback influenced the direction of the engagement. By clearly communicating this information, CoCs demonstrate their commitment to partnership with people with lived experience and the influence of that partnership on the engagement.

Whenever possible, meet with your partners with lived experience to debrief their experience participating in the engagement. Give everyone a chance to share what went well in the project and what could have gone better. Consider offering anonymous opportunities to provide this feedback, like through a Jamboard or Google Form.

It is also crucial for you to ask your PLEE how they would prefer to offer feedback about their engagement experience. When people feel comfortable and safe expressing themselves, they are more likely to give honest feedback. Some PLEE will want to give feedback anonymously, others may want to give feedback in a supportive group setting, and others may feel most comfortable giving feedback in writing. Once these preferences have been established, the CoC should work on developing the feedback processes with PLEE input.

Finally, CoCs should take time to intentionally express gratitude for their partners with lived experience. This work can be time-intensive and emotionally challenging. Partnerships between CoCs and persons with lived experience are essential steps towards ending homelessness.

In addressing the consideration points below, CoCs should be able to answer:

- How results from the engagement will be communicated to participants?
- How PLEE can offer feedback about their experiences on the engagement?
- How the CoC will meaningfully demonstrate their gratitude for PLEE' participation in the project?

Table 9: CoC Considerations: Notifying PLEE of the Final Results

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
<p>What is the plan or process for following up after the engagement ends to report what impact the participants' feedback had, and, if relevant, communicate why input may not have impacted changes?</p>	<ul style="list-style-type: none"> ● Not all PLEE engagements have a well-defined end date for final results. This may be dependent on factors such as: <ul style="list-style-type: none"> ○ Whether decisions need to be made based on the completed PLEE engagement work ○ Whether the impact of the engagement work is expected to be gradual or immediate ○ Whether PLEE participation is long-term or cyclical in nature (such as sitting on a board or committee) <p>CoCs should clearly communicate to PLEE during onboarding when they can expect to see the impact of their work.</p> <ul style="list-style-type: none"> ● For engagements that are long term, cyclical, or have a gradual impact after ending, CoCs should make a regular follow-up schedule so progress is communicated to PLEE. ● If there is a defined date where PLEE participation ends or final results are expected, CoCs should meet with PLEE directly after to discuss. 	
<p>What is the process for collecting feedback about participants' experiences on the engagement?</p>	<ul style="list-style-type: none"> ● The CoC designates staff and PLEE to design an equitable feedback process including when, where, and how feedback will be collected, what types 	

COC CONSIDERATION POINTS	EXAMPLES	RESOURCES
	<p>of questions to ask, and who else will read or have access to the feedback.</p> <ul style="list-style-type: none"> ● The CoC communicates clearly to PLEE who is responsible for collecting their feedback, who will read their feedback, whether feedback is anonymous, and how their feedback will be used in future PLEE engagements. 	
<p>Does the CoC have multiple ways for PLEE to provide feedback?</p>	<ul style="list-style-type: none"> ● The CoC asks PLEE how they would prefer to give feedback to the CoC and develops processes around those preferences. ● There are a variety of ways CoCs can solicit PLEE feedback after an engagement ends: <ul style="list-style-type: none"> ○ One-on-one “engagement exit interviews” with a staff member or peer mentor the PLEE partner is comfortable with ○ Group feedback sessions(s) ○ Anonymously through an online form ○ Through email or chat 	

Table 10: Questions for PLEE Partners: Notifying PLEE of the Final Results

QUESTIONS FOR PLEE PARTNERS	IDENTIFIED IDEAS, NEEDS, AND SOLUTIONS	FOLLOW-UP AND RESPONSIBLE PARTY
How would you prefer to provide feedback about your experience in participating in the engagement?		
Would you like to provide your feedback anonymously?		

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