

# If You Build It, Will They Come?

## Recruiting and Retaining Consumers Experiencing Homelessness in Health Center Governance

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The core mission of health centers is to provide access to quality health care. The ability to achieve this mission is greatly enhanced through consumer engagement in governance structures because it grounds program planning and service evaluation in the experience of those whom health centers serve. Our [Quick Guide on Consumer Engagement](#)<sup>1</sup> reviews important considerations in developing effective governance structures and supports. This issue brief further outlines strategies for planning, recruiting, training, retaining, managing and evaluating consumer participation in health center governance, particularly consumers experiencing homelessness. These lessons were informed by conversations with over 20 key informants that included both consumer leaders and support staff. Administrators should use this brief to better understand how to prepare for and support consumer engagement. Consumer leaders should use this brief to consider where to focus attention and advocate for agency support.

Consumer engagement in governance can vary widely over time, including participation/leadership of focus groups, agency events, committees, and/or membership on Consumer Advisory Boards and Boards of Directors. Common challenges to engagement include the amount of staff time needed to support consumer leadership and competing priorities for both consumers and health center staff. Consumers face additional struggles, such as housing instability, barriers to communication methods, transportation, and meeting times that conflict with meal times, shelter bed deadlines, or work hours. Many also struggle with the belief that they do not have a voice or cannot influence change. Organizations, in turn, often lack the capacity to meaningfully support consumer engagement in the spirit of the health center governance requirements, and inadvertently end up merely meeting requirements for compliance. The strategies contained in this paper are designed to help bolster efforts to achieve the health center mission to be consumer-governed.

### Consumers are Community Volunteers

While consumer engagement in health center governance has specific constraints due to organizational and individual challenges, it builds on volunteer management approaches. Consumer leaders are fundamentally volunteers giving their time and expertise. As with all nonprofit programming, volunteer initiatives can only be successful if they are thoughtfully developed and resourced. As put by the RGK Center, “minimal effort results in minimal outcomes, meeting neither the needs of the organization nor the volunteers.”<sup>2</sup>

### Steps for Developing a Volunteer Engagement Plan<sup>3</sup>

Planning	Recruiting	Training	Managing	Evaluating
<ul style="list-style-type: none"> <li>Engage community</li> <li>Define mission</li> <li>Assess organization</li> <li>Define volunteer positions</li> <li>Develop implementation plan</li> </ul>	<ul style="list-style-type: none"> <li>Assess image</li> <li>Consider volunteer motivations</li> <li>Develop recruitment plan</li> <li>Develop message</li> <li>Find and select volunteers</li> </ul>	<ul style="list-style-type: none"> <li>Determine necessary knowledge or skills for position</li> <li>Develop orientation program and materials</li> <li>Schedule and conduct orientation</li> </ul>	<ul style="list-style-type: none"> <li>Assign a staff liaison</li> <li>Communicate regularly with volunteers</li> <li>Provide ongoing training</li> <li>Avoid volunteer burnout</li> <li>Recognize volunteer efforts</li> </ul>	<ul style="list-style-type: none"> <li>Design the evaluation</li> <li>Collect data</li> <li>Analyze results</li> <li>Report results</li> </ul>

## Considerations for Volunteer Engagement for Consumer Volunteers

### Planning

As nonprofit organizations, most health centers have mission statements and strategic plans. These can guide the planning for integrating volunteer programs within larger organizational goals, and how to communicate that connection with staff, volunteers, and potential volunteers. When assessing if an organization is ready for volunteers, health centers should consider staff responses, roles that are needed and appropriate for volunteers, and the necessary resources for supporting volunteers. Creating the buy-in for these programs begins with engaging key stakeholders from the beginning to maximize their experiences and input.

**Consider the specific needs of consumer volunteers.** People experiencing homelessness have higher rates of trauma, barriers to ongoing engagement, and a history of disempowerment that discourages engagement. Volunteer programs need to consider how they are engaging people in trauma-informed ways and creating safe, welcoming environments in order to provide for emotional and psychological supports.

#### What to Include in an Organizational Plan

- Guiding vision on why consumer engagement in governance is mission-critical
- Short- and long-term goals
  - Set reasonable expectations for the length of time to recruit new members and build engagement. Leave flexibility for the group to evolve and develop their own goals.
- Organizational resource allocation
  - When considering resource investment, it is important to look at the direct costs (money and time) of supporting volunteers, and the indirect costs of recruiting, training, managing, and evaluating volunteers.
- Roles for staff, including support staff and agency-wide provider roles
  - Consider dedicating one support staff for consumer engagement given the time of facilitating organizational supports and space, developing constructive staff and volunteer relations, and the barriers of volunteering for people who may be struggling with a variety of personal challenges.
    - More information is available in [Guidance for Consumer Advisory Board Staff Support](#).<sup>4</sup>
- Roles for consumer leaders
  - Role descriptions should include expectations and responsibilities based on the various roles. The descriptions should outline the time commitment, responsibilities, and necessary skills or characteristics.
- Any policy or liability issues

### Recruiting

Volunteers give their time to organizations they consider valuable and where they can make a difference. When developing a plan and message, consider why volunteers should give their time to the organization. The process should benefit both the organization and the volunteer; thus, it is important to understand the needs and desires of potential volunteers to maximize their contributions and commitment.

**Consumer generally volunteer due to their commitment to the organization, the mission, and the community.** Consumers interviewed noted that they participate because they want to make a difference, be a part of a community, support the work of their health center and their city, promote social justice, and share the reality of the experience of homelessness. They found volunteer experiences valuable because they allowed for personal growth and better engagement in their personal health care. It is important to consider this in developing the plan, roles, and messaging so you can emphasize the value for consumers.

**Create diverse methods of consumer recruitment that engage all services and staff.** We will explore strategies for consumer engagement in organizational governance and advocacy in the next section.

**Core Values for Consumer Volunteers**

*(Important characteristics and beliefs for all health center volunteers)*



**Training**

Orientations and trainings help volunteers see how they fit within an organization to better understand their role, maximize their effectiveness within the role, and help them discuss the organization externally.

**Engaging consumer volunteers should include both orientation and opportunities for ongoing training.**

Different roles will require different orientations and trainings. Relevant organizational information to include is mission, values, history, services and structure. Role information to include is expectations, behavior agreements, and information needed to perform required tasks. Consumers serving on the Board of Directors require specific training (as do non-consumer Board Members) on health center compliance and accreditation standards. Opportunities for leadership development should be regularly provided, including ongoing, immediate feedback and coaching. Topic-specific trainings can be standalone trainings or built into regular meetings for Consumer Advisory Boards; using speakers from staff can facilitate relationship building.

**Key Skills for Consumer Volunteers**

*(Consider current skills and potential to develop skills during recruitment and build into training opportunities)*



**Managing**

Volunteer management must balance volunteer needs for ongoing support to perform tasks effectively, with freedom and authority to complete tasks independently. It should include ongoing efforts to demonstrate appreciation for the contributions of volunteers. This recognition can be expressed in respect, gratitude, and praise on a regular basis, and should be sincere and personal. Special volunteer recognition efforts should acknowledge the impact of consumer engagement through celebrations of appreciation and achievements.

**Consumer volunteer staff should consider what supports individuals and the group needs.** Support staff should regularly check in with consumer leaders to see how they are feeling about their work and what help they need. For consumers who may be struggling with housing, health, or economic stability, consumer volunteer staff must consider what supports they can provide, and what should be referred to clinical staff. Staff also need to balance supporting consumer leaders and the goals of the health center, which may not always coincide. Any conflicts between the organization and consumer leadership must be resolved together in a respectful way.

**Evaluating**

Evaluation methods should include annual assessments and regular feedback. There should be opportunities to define areas for improvement, strengths, and goal setting for both the organization and individuals. Measurements for the program can also include participation rates, attitudes, or skill development.

**Provide spaces for consumer volunteers and staff to openly communicate about what is working, what needs improvement, and how they grow together.** Sometimes consumer leaders feel safe openly discussing negative experiences or asking for additional support but voicing those topics can be intimidating. It is important to model open, constructive communication, and create spaces where consumer leaders and staff are honest about growth opportunities as individuals and as organizations.

## Recruitment Strategies for Consumer Engagement

The principles of recruitment, engagement, and leadership development are connected and build off one another. Without recruitment activities, consumer leaders cannot share in health center governance; without meaningful roles in leadership, consumers will cease to participate.

**It is important to create a 'ladder of engagement' with a variety of opportunities like focus groups, listening sessions, surveys, or lobby in-reach.** Health centers need to provide a number of different roles and activities with various intensity, time commitment, or required skill sets. The variety of opportunities allows people to find their place in the work and provides for a greater diversity of people to participate. Activities should create spaces for people to start small and deepen their engagement, as they are able, or step back from the work if needed.

**Advertise volunteer opportunities often and in different ways.** Consumers may need to hear about opportunities numerous times before they decide to volunteer. It is important to be consistent and persistent in these efforts and advertise in different places within the organization (e.g., the lobby, clinical space, etc.).

### Recruitment Activity Strategies

#### Outreach

- Get recommendations from providers and community partners and from current consumer leaders or leaders in the community with the lived experience. Behavioral health or case management providers who spend the most time with clients may be able to gauge consumers' core values or potential for key skills.
- Provide the role descriptions as handouts so roles and the work are clear when recruiting.
- Promote governance opportunities at other health center client groups and all site locations.
- Post flyers about the opportunities and meetings around the clinic, particularly the lobby or waiting room.
- Have current consumer leaders engage in 'lobby in-reach' by talking to consumers in the lobby to build relationships and invite them to future meetings.
- Use feedback mechanisms to recruit engaged participants from focus groups and listening sessions. Consider developing focus groups based on specific topics so people can plug into events they are interested in. You can also use current consumer leaders to facilitate these sessions to develop spaces for new attendees to feel comfortable in, and build leadership development for current members.
- Provide reminder calls or emails for meetings or focus groups to interested members. Be sure to ask people their preferred method of communication so you can connect effectively.

#### Events

- Engage consumers in organizing health fairs or provide a consumer engagement booth at a health fair.
- Invite consumers to help organize a Homeless Person's Memorial Remembrance on December 21 to honor those who have lost their lives while experiencing homelessness, or a Summer Solstice Celebration on June 21 to recognize that homelessness does not define a person and is not permanent. Use these events as an entry point to get more engaged in health center governance.
- Use voter registration efforts to promote the importance of engaging in civic processes, like organizational governance.
- Develop events or projects that are important to your community or that consumer leaders are passionate about, like art fairs or community events.

**Relationships are critical for successful recruitment.** When engaging in outreach with potential volunteers, find out their interests and passions, their goals and skills, and connect their responses to engagement opportunities. Relationship building and outreach should be based in trauma-informed approaches. Consider individual circumstances, practice active listening, be non-judgmental and open-minded, pay attention to emotions, and always ask people if they want to engage. A direct request is one of the best ways to get volunteers.

**Using current consumer leaders in recruitment activities demonstrates the enthusiasm and realism of current engagement efforts.** People are offered many opportunities to volunteer or give feedback, but rarely know if those opportunities are meaningful or productive. Engaging current members in these efforts allows potential consumer leaders to build relationships with folks they will be engaging with and see that consumer engagement is genuine. Current members should work intentionally to engage people outside of their usual circles so that organizations can ensure diverse representation of experiences, identities, and services.

## Retention Strategies

People stay where they feel respected, valued, and are with people they care about. Health centers are well positioned to take their knowledge about trauma-informed approaches to create environments and volunteer roles based in dignity, empowerment, and relationship building.

**Community spaces for engagement need to foster relationships amongst the group, and between the group and the organization.** Environments begin with the values they are founded on which shape the tone, culture, and atmosphere of interactions and work. The values must include ensuring dignity, creating safety, fostering empathy, and building healthy relationships upon trust and respect.

**The relationship between consumer leaders and organizations must be built on the same principles of trauma-informed approaches, but also work to engage consumer leaders as partners in the decision-making process.** When developing how the organization wants to get feedback, the plan should clearly outline where the information goes, how it is used, and how decisions are reported back. Consumers should be free to share their opinions and perspectives, even if they are difficult for staff and the organization to hear. To facilitate this process, many consumer leaders find it helpful to have executive leadership at their meetings so they know who is receiving their feedback, and questions can be addressed in the moment, rather than “giving feedback to a black hole.” They also appreciate having a variety of staff attend the meetings so they can develop organization-wide connections, rather than limiting relationships to a few staff members. At the Board of Directors level, non-consumer members should ensure a welcoming and equitable environment during meetings, using the strategies outlined at the end of the document in “Creating Healthy Group Dynamics.”

**To support consumer participation, organizations should also consider what resources they can provide for consumer engagement projects.** Most organizations provide for food and transportation for meetings and events as compensation for the consumers’ contribution. Some also provide stipends for the work, which is an additional acknowledgement of the benefit to the organization. Regular recognition or acknowledgement of contributions is important in whichever form is right for the organization. Organizations and leaders should also work to create meetings at times and in locations that are accessible and consistent.

**Organizations should create opportunities for consumers to move from engagement to leadership.** Engagement opportunities give people the power to use their voices and feel as if they are having a meaningful impact on the organization and the work. Leadership development opportunities allow consumers to guide the work and the group, and grow their skills and knowledge for use over their entire lives. These activities involve developing, planning, organizing, and leading on their own projects that can include facilitating focus groups or community events like those listed above. It is important to find ways to share power with consumer leaders.

***Consumer leaders want to feel that they are integral to the organization, not an afterthought.***

## Conclusion

Consumer leaders want to feel—and should genuinely be—meaningful partners in the work of health center governance. This work involves substantial individual and organizational commitment. Yet the health center community is accustomed to overcoming profound challenges and realizing substantive progress. Creating work on this scale takes time, capacity, resources, and intentionality. Implementing the strategies outlined in this issue brief will help organizations start where they can and build from there.

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## References

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## Creating Healthy Group Dynamics

For use in focus groups, community events, Consumer Advisory Board meetings, or Board of Directors meetings

- **Allow for balance of task achievement and process.** It is important for everyone to have time to participate and share. Pay attention to the emotional climate of the room and the relationships. Prioritize well-being over the need to get things done. Ensure everyone has time to speak in the meeting by using guidelines like step up, step back or one speaker at a time.
- **Be flexible with varying behaviors or communication styles.** Some people may come into the meeting with a lot happening personally for them. Prioritize participation and engagement over idealized performance.
- **Address ‘disruptive’ behaviors using a trauma-informed approach.** Balance the needs of the group and the needs of the individual. Emotional safety is important for everyone, so it is important to consider when to intervene. Determine if a behavior can be ignored, should be addressed for the participant to gain insight or growth, or that which is disrespectful or harmful to others. Behavior that is disrespectful or harmful to others should be addressed in the moment, so all parties are able to discuss their feelings and reactions to ensure their emotional well-being and maintain trust and respect within the group.
- **Include time for team-building.** Work to create conversations and feedback mechanisms that help people overcome their personal prejudices or personality differences in order to understand each other and form relationships grounded in respect and empathy. Develop time for informal meetings, either one-on-one or with the group, to check in on each other as people, not just coworkers.
- **Develop group agreements and roles for meetings.** The group should decide together how they expect members to create respectful and empathetic interactions. Roles that some Consumer Advisory Boards have used include facilitator (often the chair), timekeeper, stack taker (to keep track of who wanted to speak next), and vibes watcher (to pay attention to the emotional climate of the space). These roles are often filled by consumer members to support member accountability rather than staff monitoring.
- **Create appreciation for “chaordic” environments.** Work to blend elements of order and chaos. Interactions, meetings, or events may not go as planned, but try not to be frustrated by lack of perceived progress. Instead, maximize the time and moments available.
- **Create an expectation of self-care.** All people need to consider their personal limits and boundaries with the work and methods for relieving stress. People who need breaks from the work or meetings should be honored for taking care of themselves, not shamed for missing or disrupting.
- **Connect people with mentors.** New consumer leaders can be supported by seasoned leaders on the local level or from the National Consumer Advisory Board.