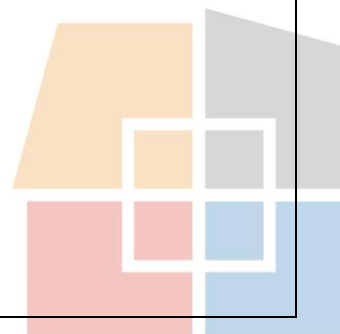




Community
Mental Health
Action Plan

Navigation: Finding Our Way Together

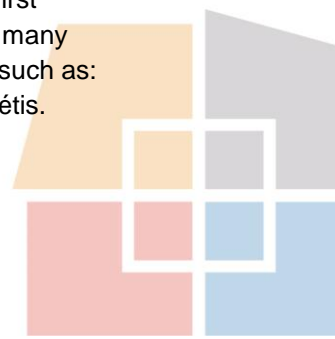
December 2018



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We would like to acknowledge that this work was done on the Territory of the Treaty 6 First Nations and the Métis Nation of Alberta Zone 4. We would also like to acknowledge the many Indigenous peoples whose ancestor’s footsteps have marked this territory for centuries such as: Cree, Dené, Saulteaux, Nakota Sioux, Blackfoot, Inuit as well as the homeland of the Métis.



Executive Summary

Albertans have frequently expressed how difficult it is to navigate the mental health system. The consequences of this include individuals and families not receiving the supports they need.¹ To ensure we provide supports to individuals in a timely manner, we need to understand what makes a difference in navigating individuals and families. Navigating the mental health system is an area in which gaps of evidence exist. Therefore, we embarked on our own research.

In our work, we defined navigation as the act of linking and connecting individuals to trusted and relevant services and supports in a timely and trauma informed manner. We believe a navigator is anyone who connects individuals to trusted and relevant mental health services and supports using a knowledgeable, collaborative and empathic approach.

We connected with navigators, which included professionals, individuals with lived or living experience with mental health issues, and family or friends of individuals with mental health issues.

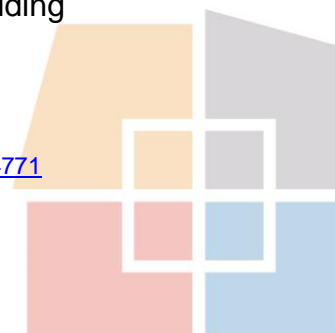
In our discussions with navigators, we learned what characteristics are required to be a successful navigator, along with the conditions required to successfully support clients moving through the mental health system.

The findings validate what some of us have known for a while now, which is that there continues to be barriers that prevent individuals from receiving the supports they need.

Highlights from the findings:

- Activating competencies and personal characteristics matter - we heard that navigators are better able to successfully navigate clients when they are relentless and assertive
- Building relationships with clients and other service providers is key to navigation
- Navigators need to understand how the systems they are navigating work and understand how services they are referring clients to work
- All organizations need to provide an environment conducive to building relationships and maintaining them

¹ Valuing Mental Health: Next Steps (June 2017) <https://open.alberta.ca/publications/9781460134771>



Reflections for further consideration

1. What supports do frontline workers need to access to continue to be as effective as they are and prevent burn-out?
2. How can managers/executive directors/formal system management foster a navigation culture?
3. How can we work from a system-wide perspective to begin to bridge the cultural gulf between systems?

“Some of these systems are challenging for anybody to navigate ... Hand-holding is a critical part of any worker’s role. Helping youth “navigate and negotiate” the resources they need for their well-being actually increases resiliency².... Journeying beside the youth... can enhance the level of trust as well as instilling a sense of value, worth, and empowerment, all while getting their needs met. A good navigator sees all of this potential while the worker who sees this as enabling misses a significant opportunity to help the youth to increase their resiliency and to move forward in their lives.”

- Peter Smyth, Specialist in High Risk Youth Services at Children’s Services - Edmonton Region

² Ungar, M. (2015). *Working with children and youth with complex needs: 20 skills that build resilience*. New York, NY: Routledge.



Defining Navigation and Navigators

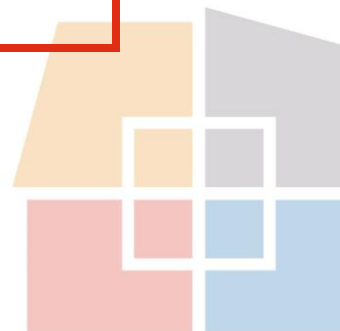
Navigation has many different meanings to those who use it. The Community Mental Health Action Plan defines it this way:

Navigation is the act of linking and connecting individuals to trusted and relevant services and supports in a timely and trauma informed manner.

In addition, we believe a **navigator** is a person with mental health concerns or a family member or friend of that person who is trying to find their way through the mental health system. It may also be a professional who connects individuals to trusted and relevant mental health services and supports using a knowledgeable, collaborative and empathic approach.

Guiding Principles of Navigation:

- a. We believe in using a **systems thinking approach** that acknowledges the broad continuum of mental health services available.
- b. We believe that respectful navigation needs to be **relationship based**.
- c. We believe that navigation should **build the capacity** of the individual seeking support.
- d. We believe that navigation should be **flexible and responsive** to the unique needs of the individual being served.
- e. We believe that there is **no wrong door** to enter to receive mental health services.
- f. We believe that navigation does not end with the warm hand off but **includes follow up**.



Why We Did This

We found that there is little research on the role of navigators in the mental health system, so we decided to:

1. Engage navigators, whom we knew to be successful in navigating clients, in discussion groups to explore the ingredients behind their success
2. Meet with family members, friends, and natural supports³ who have become expert, non-paid navigators as they have sought to navigate the mental health system for their loved ones

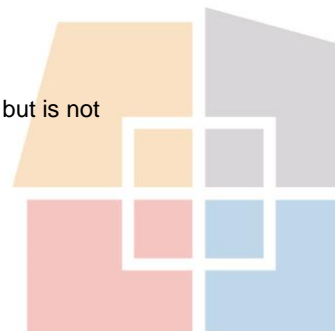
Albertans have frequently expressed how difficult it is to navigate the mental health system. The consequences of this include individuals and families not receiving the supports they need, leaving those who experience higher levels of oppression and barriers with an even more reduced chance to receive the supports they need.

In order to ensure Albertans receive the supports they need when they need it, professionals who are helping clients in any capacity need to be able to navigate clients appropriately.

This work relates to the following goals and action items in the Community Mental Health Action Plan:

- **Goal 2:** *Improve diverse partners' ability to navigate the system by facilitating system-level coordination and collaborative practice.*
- **Goal 4:** *Support a seamless navigation of mental health and addiction services for individuals and their families/caregivers.*
- **Action 7.3:** *Strengthen alignments with government and community partners committed to using evidence informed practices.*

³ Natural supports refer to the relationships that a person develops in their community. It includes but is not limited to family, friends, co-workers, neighbours, coaches, teachers, mentors, and Elders.
https://www.dds.ca.gov/Publications/docs/Natural_Supports.pdf



Process

The Evidence Foundation Leadership Team developed a list of professional navigators to contact. The list included navigators who work in various sectors, such as health, education, housing, mental health, employment, and who work with diverse populations such as children, youth, families, seniors, homeless, newcomers, refugees, Indigenous, and LGBTQ. Individuals were chosen based on their expertise as navigators, not the organization they work with.

The list of family members, friends, and natural supports who have become expert navigators included individuals who attended our October 4, 2017 gathering, and who were interested in supporting the goals and actions of the Action Plan.

Professional navigators attended a two-hour session on February 1 or 7, 2018. Family members, friends, and natural supports attended the February 8 session.

Discussion Questions

Discussion questions were developed by the Evidence Foundation team, with input from the System Integration and Service Delivery Leadership Teams.

- Competencies/skills: what knowledge, personality traits and attitudes are important for being a good navigator?
- Relationship building:
 - How do you go about ensuring you have the right relationships in place to navigate effectively?
 - How much does the culture of your organization contribute to your ability to be a good navigator? What is it about that culture that is important?
 - Barriers: What strategies do you use to get around navigation barriers?



Why the Findings are Important

From our findings, we see there are costs to individuals at all levels of the mental health system. From caregiver and navigator burnout to continued fragmentation between programs, services, and systems to individuals not receiving the supports they need. The information in this document confirms personal knowledge for many, and is important because it validates those who have been experiencing this.

At the same time, the findings highlight potential shifts in practice we can do to ensure individuals and families can navigate the mental health system appropriately.

This document highlights how navigation depends on the competency of navigators. It also highlights how important it is to support frontline workers who do navigation and who do it well. At the end of the day, in order for individuals and families to get the supports they need, everybody (professionals, friends, family, natural supports) should have some skills that can help others navigate.

The findings also highlight that the personal characteristics of individuals influence the work that people do. People can be trained in concepts, but how they do the work matters, and how they do the work depends on their personal characteristics. Therefore, it's important to train people in developing competencies (i.e. personal characteristics), not just learning concepts.

“As soon as we understand each other’s realities – we can support clients better.”

- Corinne Saad, Director of C5

Individuals with lived or living experience and their family and friends often know what needs to happen, however, they might not have the tools to get what they need. If they don't have the tools they need, it's our role to help them with that so they can become strong advocates for themselves.



How You Can Use the Findings

From the perspective of the individual and a frontline worker, you can use these findings to assess and recognize which traits you have and to what degree. From the perspective of organizations, you can use these findings to guide how you hire and train people. From the government perspective, you can continue building relationships with community to consult with and leverage their resources.

The findings in this document will be utilized by the Community Mental Health Action Plan to inform:

- A mental health training framework which provides a starting point on mental health trainings that will develop more knowledge about mental health related topics
- Health practitioner student training for medical students, physiotherapists
- Developing resources and tools to support navigation
- A navigation exemplar to be included in our evidence-informed practices guide on mental health



Findings

Characteristics, Skills, Knowledge, and Competencies

In order to get support for their clients, navigators indicated the following as essential:

- be relentless and assertive in their approach to get attention and explain an individual's circumstances
- be successful in establishing relationships
- have knowledge about applicable legislation
- know what language (or buzz words) service providers use in order to open the necessary doors
- know what forms need to be completed (or boxes to be ticked)

Characteristics

- 
- | | |
|------------------|----------------------|
| ❖ Courageous | ❖ Critical Thinker |
| ❖ Confident | ❖ Problem Solver |
| ❖ Relentlessness | ❖ Stamina |
| ❖ Tenacious | ❖ Assertive |
| ❖ Consistent | ❖ Humanistic |
| ❖ Empathetic | ❖ Patient |
| ❖ Listener | ❖ Resilient |
| ❖ Understanding | ❖ Aggressive |
| ❖ Strong | ❖ A love for justice |



Skills

- Recognize the signs of when someone is in trouble or dealing with a mental health crisis
- Build trusting relationships with individuals and service providers
- Make yourself available
- Provide follow-up with individual requiring assistance

Knowledge

- **How to communicate with service providers to gain access and support**
 - Know the proper language and buzz words to use in order to be seen by a service provider
 - Know how to properly fill out application forms
- **Understand the legislation and policies mental health service providers follow**
- Lived experience of mental illness
- Know which services to contact when an individual is in a crisis

Competencies

- Accountable to the individuals we serve and the organizations we work for
- Up-to-date and current with available treatment options
 - Provide the client with direct links and information about the service to ensure they do not have to do any searching
 - “Warm hand-off”
- Know an individual’s mental health history and behaviors
 - Be prepared - have documentation and records when accessing mental health services; this helps build a case
 - Know when onset of mental health problems may occur for an individual
- **Have relationships/connections with service providers and supports who are trustworthy**
 - Do your ‘homework’ before you meet with providers
- Navigate with the individual
- **Be aggressive in order to get the individual the service they require**



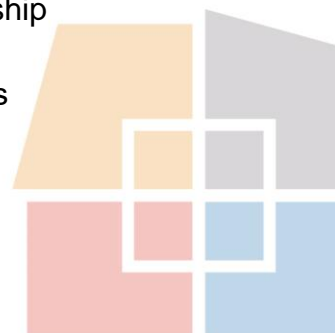
- Empower and train individuals so they have the necessary skills to navigate the system themselves
- Be relentless
 - Have an “acting” mindset not an “accommodating” mindset
- **Work around system barriers**

Relationships

Relationships are essential to the overall success of navigators getting what’s needed for an individual.

Between Professionals/Service Providers

- **Requires a significant amount of background work (i.e. time, searches, phone calls)**
- Imperative to be built on trust and rapport
- Shared knowledge
 - Need to work together and continually share knowledge
- Dedicate time for monthly meetings to share information
- Important to build on existing networks
 - Attend community meetings
- **Organization must make a commitment to building and maintaining relationships**
 - Needs to come from senior level management
 - Organizations must give permission so workers are allowed to build relationships
 - Management needs to engage frontline workers at decision making tables
 - Everybody has intrinsic worth!
 - Mentorship from management level
- Co-location of services allows for a better understanding and relationship between service providers
 - Allows for “warm hand-offs” and seamless transition of services
- Must work together and not be in competition with one another



- All providing complementary services
- **Requires all levels of the system to be collaborating and building relationships with one another**
 - **Government, Alberta Health Services, Members of Legislative Assembly, community organizations, etc.**
- **Provide “warm hand-offs” with one another to ensure client’s needs are being met**
- **Helps to know who the right person within an organization or system is in order to elevate and tackle an issue**

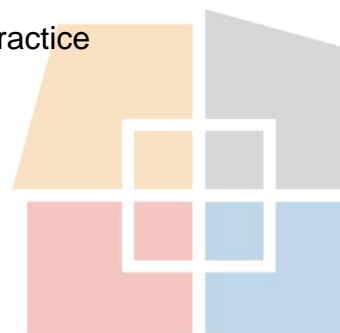
Between Individuals and Community Members

- Must be able to use appropriate language that is understandable to the individual
- Connection occurs in an authentic way
- Take time to be understanding and empathetic
- Recognize people’s bravery in coming forward for assistance
- Confidentiality when dealing with people’s struggles
- Have individuals leave with a feeling of dignity (heard and listened)

Training

Being trauma informed and understanding government systems is critical to successful navigation.

- Formal training from organization and/or schooling program allows for a good understanding of the federal, provincial, and local mental health system and available supports
- Trauma-informed practice, anti-oppressive practice, harm reduction practice

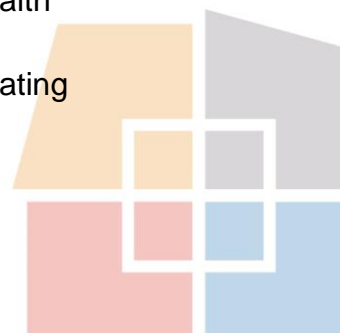


- Understand the multiple systems that exist and how they interact with each other (i.e. the personal/experiential, organizational, and government level of systems)
- Understand how to interact with the system and people
- Strength-based training
 - Working off of the individuals' strengths
 - Requires meeting the individual at the stage they are at
- Many education programs teach only advocacy, NOT navigation
 - Many times navigation training is reliant on the organization that hires you

Difficulties Faced

A cultural divide exists between government/formal systems and the not-for-profit sector.

- Inconsistency of crisis support lines
 - Individuals have had mixed experiences (positive and negative)
- Being redirected/bounced around to multiple mental health resources
- Multiple mental health emergency help lines
 - Which one does what? Who should you phone?
- Access to services is almost non-existent for individuals living below a certain socioeconomic status line
- **Very difficult for individuals dealing with a mental health issue to learn how to navigate the system**
- Caregiver and navigator burnout
 - Lack of understanding from the system
- Ignorance towards mental illness in society
- Inconsistent information sharing between health care professionals and agencies
- Mental health is not seen as a priority in all schools and organizations
- Lack of funding in some areas across the province towards mental health initiatives
 - Ex: training teachers in schools for mental health literacy, educating parents, educating peers, etc.



- Many individuals with a mental health illness do not have personal supports that are willing to assist with navigation
- Navigators are only as good as the information they have, and the information is frequently changing
- The mental health system is such a large system, and services change rapidly
- **Lack of communication and bridge between the medical and psychosocial systems**
 - **Poor understanding of what resources are available in the community by medical professionals**
- **An unwillingness of service providers to build meaningful relationships and problem solve**
- **Lack of understanding of what happens on the frontline by higher management and government workers**
- Language and cultural barriers
- Services are not always accessible and/or affordable
- Separation within the system between addiction and mental health services
 - Seen as separate entities
- **Not all organizational cultures allow for relationship building to occur**



Recommendations

Characteristics, Skills, Knowledge, and Competencies

- When hiring, look for people with practical skills that fit the competencies the position requires

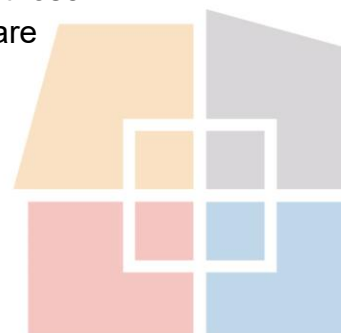
“When you work with human beings in any type of relationship based practice, it is personal work done professionally, which means we can never discount the personal qualities and characteristics someone brings to their job. I always hire for personality, skill and knowledge in that order. For navigators, given the personal characteristics people have identified, only a behavior competency model of hiring would work.”

- Line Perron, Director and CEO of Early Childhood Development Support Services

- Ensure everyone in your organization has an understanding of navigation
- Nobody will have all the characteristics, skills, knowledge, and competencies listed in this document, which is absolutely okay! Each of the characteristics, skills, knowledge, and competencies will be utilized at different parts of the spectrum of mental health supports. Example: being relentless might be more important as the navigation becomes more complex (i.e. multiple and complex needs).

Relationships

- Honour the relationships frontline workers have built and recognize that relationship building takes time and is a part of the work of navigating people
- A “warm handoff” should be a part of the navigation process. We heard consistently that families and caregivers can become distrustful of those trying to support them when they don’t feel heard or feel like they are trying to be pushed through the system quickly



Training

- Utilize training that builds on competencies
- It's important that training involves connecting new navigators to your current connections so they can build their own unique relationships with them
- Take the time to go to places you might make referrals to so you can build relationships and understand from the other service provider's perspective what is happening on their end
- Have an understanding about legislation and the different information sharing acts available

For Further Consideration

1. What are the supports that frontline workers need to continue to be as effective as they are without burn-out?
2. How can managers/executive directors/formal system management foster a navigation culture?
3. How can we work from a system-wide perspective to begin to bridge the cultural gulf between systems?



Resources

Office of the Information and Privacy Commissioner - Principles for Getting Information Sharing Right

This document outlines six principles to consider when planning for an information sharing initiative. The principles are transparency, legal authority, privacy impact assessments, access and correction, accountability and oversight. It also provides links to related documents. Published in June 2017.

<https://www.oipc.ab.ca/resources/principles-for-getting-information-sharing-right-advisory.aspx>

Information sharing guide for social-based service design and delivery

This guide introduces an overarching approach for accountable and effective information sharing that supports program design and delivery in the social-based services sector. It is intended for decision-makers, information and privacy practitioners, policy development staff and program advisors, and legal advisors in government programs and services, health care organizations, contracted service provider agencies and other community agencies. It is recommended this guide be used with the companion Information Sharing Toolkit to understand how to operationalize information sharing best practices.

<https://open.alberta.ca/publications/9781460136812>

Information sharing toolkit for social-based service design and delivery

This toolkit contains resources such as themed frequently asked questions and checklists and complements the Information Sharing Guide. These two documents provide resources to help reduce the complexity that arises when applying different privacy legislation while planning and designing social-based services and programs. This toolkit is designed to support decision-makers and frontline service delivery staff within government organizations, health care organizations, contracted service provider agencies and other community agencies.

<https://open.alberta.ca/publications/9781460136829>



211

211 is a 24-hour information and referral line that helps people connect to social, health and government services. It can be used by service providers to find out about the resources in their community. It means that service providers can focus on navigating and not having to remember the many services in the city and the changes to the programs. It can also be used by clients themselves.



About the Community Mental Health Action Plan

Helping Albertans get the community support and mental health services they need when they need them

The goals and actions of the Community Mental Health Action Plan were developed collectively through consultations with professionals across diverse sectors, people with lived experience, and by analysis of local and provincial reports and evaluations. The goals chosen by stakeholders work within the reality of the existing system and resources.

The Action Plan involves diverse government and community stakeholders invested in making systemic changes, to improve access to mental health supports for Albertans. We've leveraged and integrated our wisdom and skills to collectively identify where we can enact meaningful change. The Plan details actions that focus on promoting of positive mental health, ensuring Albertans can access supports during a crisis and preventing a crisis from happening in the first place.

Diverse community members are working together on goals and actions under three focus areas. These three focus areas are:

- System Integration: working collaboratively across sectors to share resources and increase access to the full continuum of care of mental health and wellness services.
- Service Delivery: building capacity of on the ground professionals, community members, individuals and families in navigating the mental health system.
- Evidence Foundation: encouraging the use of evidence as the foundation for actions and practices.

Alignments

- Living Hope: A Community Plan to Prevent Suicide in Edmonton priority action 5.3: contribute to the development of comprehensive referral and bridging protocols for people at risk of suicide that ensure supportive



- transition between care providers, where relationships of support are maintained⁴
- Valuing Mental Health: Next Steps focus area of action: act in partnership to create an integrated system

Acknowledgements

We would like to thank our funders, the City of Edmonton and Government of Alberta, and the backbone support provided by the United Way of the Alberta Capital Region. Thank you to the exceptional navigators who participated in these conversations and shared their wisdom and are doing the everyday work needed to get clients the supports they need to live the lives they want. Thank you to the amazing mental health advocates who shared their stories of trying to find their way through the mental health system. And last, but not least, the individuals who have supported the implementation of the Action Plan to ensure individuals and families will experience a better mental health system. See below for a list of participating organizations.

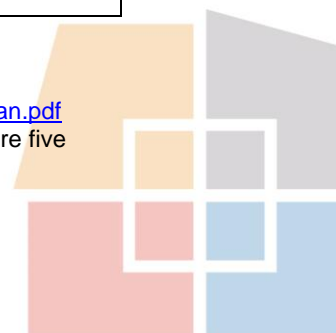
Thank you Corinne Saad, Susan Morrissey, and Duncan Maguire for hosting the sessions and facilitating the conversations.

Organizations Represented on February 1 and 7, 2018⁵

- Bent Arrow Traditional Healing Society
- Boyle Street Community Services
- Canadian Mental Health Association – Edmonton Region
- Children Services Edmonton Region
- Chimo Youth Retreat Centre
- Eating Disorder Support Network of Edmonton
- Edmonton-Centre Constituency Office of MLA Shepherd
- Lions Village
- Momentum Walk In Counselling
- Rundle Health Centre
- Sage Seniors Association
- St. Albert and Sturgeon Regional Collaborative Service Delivery
- The Family Centre
- U of A Community Social Work Team

⁴ https://www.edmonton.ca/programs_services/documents/PDF/living-hope-suicide-prevention-plan.pdf

⁵ Only organizations who consented to sharing their organization names were included. There were five organizations represented who are not listed here.



- YWCA Edmonton

Organizations / Individuals Represented on February 8, 2018

- Advocate for Homeless Individuals
- Caregivers Alberta
- Education Consultant
- Families Supporting Adults with Mental Illness Alberta
- Individual Mental Health Advocates

Get in Touch

You can find out more about the Community Mental Health Action Plan at www.myunitedway.ca/mentalhealth

We would gladly like to hear from you about how you are using these findings!
Our email is info@mentalhealthactionplan.ca

