GRANDE PRAIRIE & AREA
Community Compass

Grande Prairie & Area

Registered Level 2 System Navigator

ORIENTATION GUIDE

COMMUNITY FOUNDATION *of* Northwestern Alberta

THE CITY OF GRANDE prairie

County of Grande Prairie No. 1

Contents

About this guide and the System Navigators Collective

The Community Compass System Navigators Collective is an opportunity to better serve the needs of people who access services throughout our community, allowing us to build sustainability into our approaches that we can adapt over time. This guide has been developed to support Grande Prairie and area and those of you who, formally and informally, provide 'navigation' as part of your role. This guide, which offers acknowledgement and support for the navigation aspects of your day-to-day work, is not intended to be a complete set of protocols for the Community Compass system but is one of its many components.

As a Community Compass System Navigator, your influence can be uniquely helpful to those in need. With our community's 'no wrong door' approach, this guide and orientation will increase your effectiveness as a navigator. When we work together as system navigators to follow coordinated, systematic, and standardized referral and navigation practices whenever possible, we make our navigation efforts more efficient, giving people who are accessing services the help they need more quickly. This streamlined access to services strengthens our community's COVID-19 recovery efforts and ensures that we can return to an efficient and coordinated system for delivering services to community members.

This *Registered Level 2 System Navigator Guide,* and the orientation that accompanies it, supports you to:
- Understand and find referral options across a range of demographics and individual needs. You'll know 'where to look' to support the diverse populations you serve and engage with in your community.
- Use a baseline approach for how and when to make referrals.
- Build and maintain a network of sustainable referral pathways that can be adapted to changes in personnel over time.
- Adhere and contribute to a community-wide standard for system navigation supports.

Who is this guide for?

Level 2 System Navigators in Grande Prairie have a wide range of skills and knowledge, and a breadth of experience. For those already familiar with navigation in the community, this guide identifies the minimum requirements and suggested core competencies to be a Registered Level 2 System Navigator. For those newer to their roles, the guide includes additional information and learning on topics like person-centered approaches, building a referral network, and digital navigation.

Introduction: What is Level 2 System Navigation?

Community Compass: *Coordinated Access in Grande Prairie and Area*

Some of the issues faced by individuals and families in Grande Prairie and area are not simple problems, but instead are complex challenges with converging factors. Challenges like poverty, mental health issues, feeling unsafe, and discrimination may intersect. Solutions to these challenges require collaboration between multiple agencies, institutions, funders, and those with lived experience.

Coordinated Access (CA) is a systematized triage process tying prevention and intensive social services programs in the Grande Prairie area together into a coordinated system called Community Compass to aid appropriate service-matching and improve access.

Some of the goals of Community Compass are to:

- Meet the holistic needs of individuals and families through information, referral and problem-solving.
- Improve user experience with navigation through accurate and high-quality information.
- Leverage all available resources in the community through consistent screening and prevention processes.
- Create a community of practice and learning for all staff who occupy roles in information and referral services.
- Establish a community-driven model of continuous improvement.

System navigators

Community Compass in Grande Prairie and area makes best use of one of the key strengths in our community: **exceptional frontline staff**. The goal of Community Compass is to create a collaborative environment by connecting a network of system navigators.

As a system navigator, you are critically important to this access system. Navigators are individual frontline staff in the community who already provide navigation and are trained in consistent information and referral processes.

System Navigator: A service-provider staff member trained and designated to support navigation, coordination, and awareness of social services in Grande Prairie and Area.

With many staff members performing navigation in the community, three defined levels for system navigators were developed, based on community feedback. Regardless of level, consistent processes, principles, and ways of working collaboratively guide all three levels.

System Navigator Level 1	System Navigator Level 2	System Navigator Level 3
- Is familiar with support for commonly identified needs and knows of many service providers in the community. - Understands the social services sector in Grande Prairie. - Assists people through online resource directories (e.g., 211, HelpSeeker, City-provided directory) and a consistent screener available to all staff to locate appropriate services and programs. - Optional: Member of the Level 1 Navigator Teams channel.	- Assists people through online resource directories (e.g., 211, HelpSeeker, City-provided directory) and a consistent screener available to all staff to locate appropriate services and programs. - Is very knowledgeable about service providers in the community, and has detailed information on population-specific services and programs, such as Indigenous or newcomer supports - Is trained in trauma-informed support, crisis management, mental health and addictions resources, and harm reduction. - Member of the Level 2 Navigator Community of Practice Teams Channel.	- Supports people to identify their presenting needs. - Is trained to support people with concurrent disorders. - Is considered an expert in system navigation in Grande Prairie, with knowledge of diverse-sector services for diverse populations. - Is trained in trauma-informed support and crisis de-escalation. - Is formally trained in a variety of specific assessments for programs that require additional screening criteria, such as the common assessment for Housing First placements, a social isolation assessment for seniors, and other evidence-based screening tools.

Characteristics of Level 2 System Navigators

In addition to the characteristics listed in the table above, Level 2 System Navigators also have many practical skills. These include:

- Listening and providing confidential support.

- Helping develop action plans for people accessing services.

- Empowering people accessing services to make informed choices that are right for them.

- Assessing the needs and strengths of people accessing services.

- Collecting assessment and referral information.

- Referring people to community resources.

- Modelling and coaching on how to identify and access supports.

- Discussing referral options and problem-solving in an unbiased and culturally sensitive manner.

- Explaining processes, rights, and responsibilities, and known timelines for services.

- Offering guidance with forms and other paperwork.

- Supporting transitions/warm transfers to other organizations or resources in the community.

- Identifying relevant benefits programs and supporting enrollment as appropriate.

- Developing relationships with other community organizations.

Level 2 System Navigators typically do not:

- **Provide counselling, legal, medical, or financial advice.**
- **Provide recommendations for medications or other specific therapies.**
- **Provide navigation support in environments outside those approved by their designated organization.**

Benefits of becoming a Registered Level 2 System Navigator

As a potential Registered Level 2 System Navigator, you are likely already doing a lot of this work, perhaps from the side of your desk. The Community Compass System Navigators Collective strives to create a support structure for this work to happen more effectively, and to bring the best resources to you. Some of the benefits of becoming a Registered Level 2 System Navigator include:

- A ready-made network of colleagues (the System Navigators Collective) who can help answer your questions, problem-solve with you, and share resources.

- Access to Community Compass training tools and resources, including workshops and training funded through project partners.

- Real-time communication pathways with other navigators through Microsoft Teams.

- The opportunity to shape processes through System Navigators Collective meetings and feedback sessions.

- Consistent training and information on eligibility, to support more appropriate referrals to all community programs.

- An oversight body to support continuous improvement and management of technical processes and grievances.

Foundational pillars of working together

Level 2 System Navigators work collaboratively based on four key foundation concepts or ways of working together by:

1. Person-Centred Approach

2. Referral Checklist

FOUR COMPONENTS

4. System Navigator Collective

3. Training
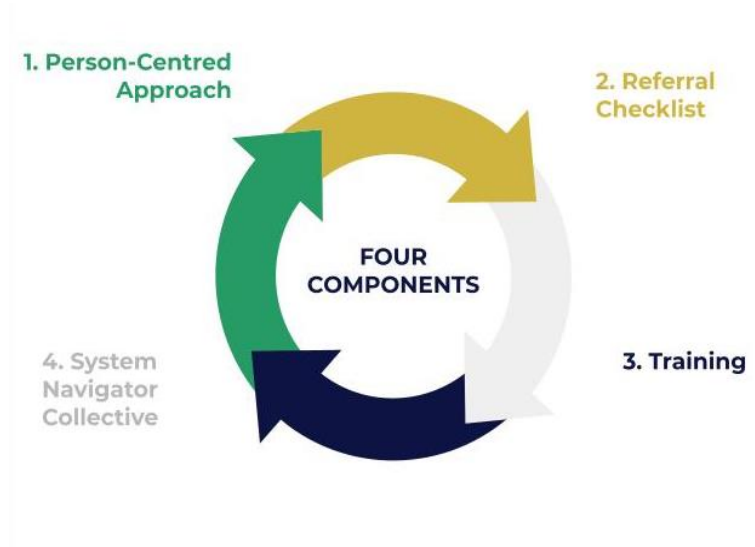
1. **Using a person-centered approach to their work.**

2. **Adhering to a uniform *Referral Standards of Practice and Checklist*.**

3. **Participating in an orientation session and making a commitment to build the core competencies of Level 2 Navigator through additional training, if needed.**

4. **Being an active part of a System Navigator Collective community of practice.**

Pillar 1: A Person-centered approach

*A person-centered approach is where the person seeking service is placed at the center of the service and treated as a person first. Person-centered design and thinking involve seeing people accessing services as **equal partners** in planning, developing, and accessing services. Individuals and families are experts in their own care and have the right to choose from options that meet their needs and fit their strengths.*

Why a person-centered approach?

One of the core purposes of Community Compass is to improve access and experiences for people seeking services. That means people need to be in control of their own journey, and system navigators need to provide a fair playing field for them to do so.

People accessing services in the social services system are your experts and partners. At times, they know the system better than frontline staff, and can generally navigate for themselves. Your role as a Level 2 System Navigator is to assist those who need help navigating our ever-changing system, while supporting the autonomy and dignity of the person accessing services. This approach can improve both equity of access and service experience.

A person-centered approach with a trauma-informed lens

As navigators, we must assume that people accessing services will often have a history of trauma. **Creating rapport, building trust, and transparently supporting people accessing services** are fundamental to navigation support through a trauma-informed lens. Many people with lived experience of poverty, mental health issues or frequent use of the social services system may mistrust the system.

Reasons for this mistrust might include:
- Harmful or discriminatory experiences when accessing services in the past.
- Historic or current relationships between service providers and religion.
- Historic or current relationships between service providers and government funding.
- Stigma relating to asking for help.

These negative feelings are particularly relevant to those who have been systemically oppressed and have had their access to services restricted, such as Indigenous people. The Community Compass and the System Navigators Collective have more work to do together to ensure the standards and processes of the Community Compass system are designed with and for everyone accessing services, regardless of race, ethnicity, language, gender, religious affiliation, sexual orientation, abilities, and economic status.

Intersectionality has been defined as "intersectional oppression [that] arises out of the combination of various oppressions which, together, produce something unique and distinct from any one form of discrimination standing alone....".

AN INTERSECTIONAL APPROACH TO SERVICE ACCESS ENSURES THAT ICA IS DEVELOPED WITH EQUITY OF ACCESS FOR ALL, AND THAT SYSTEM NAVIGATORS, WHEN ASSISTING WITH NAVIGATION, ARE ADDRESSING ALL CHARACTERISTICS AND NEEDS THAT SHOULD BE CONSIDERED WHEN SUGGESTING SERVICES.

PEOPLE ACCESSING SERVICES MAY FACE INTERSECTIONAL OPPRESSION OR DISCRIMINATION.

Examples are: ◄ ◄ ◄ ◄ ◄

- *A user who identifies as both BIPOC and LGTBQ2S+, who may need support to find culturally competent service providers.*

- *An Indigenous user with disabilities, who faces not only typical barriers for people with disabilities, but also jurisdictional issues regarding lack of disability services on reserve, and administrative barriers to accessing disability-related services off reserve.*

THE MOST IMPORTANT STEP TO COMBAT INTERSECTIONAL OPPRESSION IS TO ACKNOWLEDGE THAT IT EXISTS AND IS PRESENT FOR MANY PEOPLE WHEN THEY ACCESS SERVICES.

TO GO BEYOND THIS ACKNOWLEDGEMENT, AS A SYSTEM NAVIGATOR, YOU CAN ENGAGE IN CRITICAL CONVERSATIONS AND REFLECTION ABOUT INTERSECTIONALITY IN YOUR ROLE.

Additional Reading: https://www.opportunityagenda.org/explore/resources-publications/ten-tips-putting-intersectionality-practice

What rights do people accessing services have?

The table below outlines what rights people accessing services have and provides examples of how you can support them to exercise those rights in your role as a navigator.

People accessing services have the right to:	Your responsibilities as a navigator are to:
Human dignity and non-discrimination	
- Be treated fairly and with respect when accessing services. - Access all services available to them through the health and social services sectors.	- Treat people accessing services with respect and dignity in all interactions. - Know what information is collected by your agency and what it is used for and share this information with the person accessing services. - Acknowledge and reflect on your own biases and how those biases present in your role as a navigator. - Overcome organizational barriers to service, such as a lack of personal identification.
Privacy	
- Request safe and confidential spaces when engaged in personal conversations or information-sharing. - Know when their personal information is being collected, for what reason, and who it may be shared with.	- Become familiar with Government of Alberta guidelines (see: Training) and how to explain information and privacy policies to people accessing services. - Ensure people accessing services can safely and anonymously provide feedback on their experiences with navigators.

Participation	
• Choose which services or options will work best for them. • Participate in making decisions and in the overall design of Community Compass.	• Ensure that people accessing services are part of the conversation in all interactions. • Support people accessing services to obtain identification and complete forms and paperwork when possible.
Transparency	
• Understand decisions being made through the Community Compass, including reasons for wait lists and ineligibility for services. • Have an advocate or support person present when accessing services.	• Provide as much information as possible regarding services and navigation in Grande Prairie. including wait times, eligibility, and process-related information. • Be aware of eligibility requirements for the most common programs. • Learn which programs often have wait lists, and how long the wait for service is.
Accountability	
• Share their experience with Community Compass, including being mistreated or being given misinformation. • Access high-quality standards of service and care. • Evaluate the Community Compass system.	• Uphold high-quality standards and support for people accessing services. • Advocate for people accessing services who face barriers or discrimination. • Understand what supports are available for legal services in the community, and how best to direct people to those services. Your knowledge of rights and willingness to advocate for someone may not always fully meet their needs, so you are accountable for supporting them to find appropriate legal services.

Pillar 2: Referral standards of practice and checklist

Making skilled referrals is one of a system navigator's most important responsibilities. Everyone accessing services has unique needs, but not every service can meet every need. Therefore, referrals to help people get to the service that best fits their needs is an essential part of the Community Compass system.

When do I need to refer?

You may make a referral in any of the following situations:

- ❏ The services your organization offers are not a good fit for the person accessing services or may only partly meet their needs.
- ❏ The services the person has been accessing are no longer available.
- ❏ The person accessing services no longer benefits from the services being provided to them, or their current needs require additional services.
- ❏ The person accessing services is ready and willing to be referred to new or different services and understands the challenges that might arise during the referral.

Types of referrals and best practices

When making a skilled referral, there are best practices that should always be followed, regardless of the circumstances of the person accessing services, or your relationship with them.

Some best practices are to:
- ❏ Check with the service to which you are referring to confirm whether the service is appropriate for the person accessing services. Ask the agency:

    - ❏ Is the person I am supporting eligible for the service?

    - ❏ What makes an individual a good fit for the service?

    - ❏ What can a person expect when they are referred to the service?

- ❏ Obtain consent (verbal or written) when referring to another service provider.

- ❏ Follow up with the person accessing services or with the service to which you referred them, or both.

- ❏ Present two or three service options to the person accessing services, and check with them whether the services are a good fit.

❏ Provide enough information about the service and enough coaching on what to expect when accessing the service, including potential challenges, to help make the referral successful.

These principles apply to all referrals, regardless of the person's situation. However, there are also more nuanced approaches needed for skilled referrals.

There are two main types of referrals: cold and warm. You may choose to use a blend of cold and warm referrals, depending on what you know about the person you are supporting with a referral.

Cold referral: *A referral in which the person accessing service is given information about a service and reaches out to that service with no support.*

Warm referral: *A referral in which a navigator facilitates building a relationship between the person accessing services and the service to which they are being referred. This may include setting up an appointment, making a phone call, sending information in advance, or walking with a client to meet the service provider.*

Factors you should consider when deciding between a cold and warm referral include the ability of the person accessing service:

❏ To negotiate complex social situations.

❏ To provide information.

❏ To receive and interpret information.

❏ To tolerate waiting.

❏ To advocate for themselves if faced with discrimination.

❏ To be willing to receive help.

❏ To have a communication style that fits that type of referral.

	Cold Referrals ⟷ Warm Referrals		
	Cold referral		**Warm referral**
Responsibility for making contact	The person accessing service is given contact information and is responsible for contacting the agency.	<<spectrum of referral support>>	With informed consent from the person accessing services, you set up an appointment or call on their behalf to the other organization to support communication.
Information-sharing	The person accessing service must retell their story to the agency to which they are being referred.		The referring organization provides the person's information, with consent, to the agency to which it is referring.
Advantages	• The person accessing services is in control of their own situation and referral process		• There is a greater chance the person accessing services makes it to the service to which they are being referred.
Disadvantages	• Success depends on the ability and capacity of the person accessing service		• Can be time-consuming. • Relies on positive working relationships between referring and recipient agencies.
You might choose to use this method when	• The person accessing service is relatively independent • The person accessing service has means of communication, transportation, and funds to access the service • The person accessing service is at a low risk of developing further issues or facing barriers to accessing services.		• The person accessing service has had professional assessment mandating support or has a complicated history of challenges. • The person accessing service does not have a means for communication, transportation, or available funds to use the service. • The person accessing service is at high risk to develop further issues or faces barriers to accessing services.

EVERYONE ACCESSING SERVICES NEEDS A PERSONALIZED LEVEL OF SUPPORT, AND SHOULD BE TREATED AS AN INDIVIDUAL WITH UNIQUE NEEDS.

Referral checklist

Choosing where to refer a person accessing services is one of the most important decisions you will make as a navigator. Level 2 System Navigators use a common referral checklist to ensure the referral is both appropriate and the best possible match for the person accessing service. Based on stakeholder input from frontline staff, the referral checklist is divided into 'must-do' and 'nice-to-do' areas.

Referral standard: Must-do:
- ❏ The person accessing services is eligible for the service (or at least for an intake assessment).[1]
- ❏ I have assessed the needs of the individual beyond those that my agency can meet.
- ❏ The person accessing services has the financial means to access the service.
- ❏ The person accessing services has reliable transportation to access the service.
- ❏ The service provider is open and accepting new referrals.
- ❏ The person accessing services is informed about, and comfortable with, being referred to that service provider.

Referral standard: Nice-to-do
- ❏ Present at least two service options to people when possible.
- ❏ Warm transfers are important and should be offered to people as appropriate and are strongly encouraged for youth and seniors. This may involve a short introductory phone call to another provider or arranging a warm hand-off.
- ❏ Follow up with the person accessing services to see if they connected, which is determined by the person having made a choice and given clear consent.

What if I can't find a service that's a good fit?

When making a referral, consider how different barriers may affect the person's experience with that referral. People accessing services may face barriers to access such as:
- Missing information about what services provide or what services are available.
- Lack of capacity to take up a referral.
- Wait times.
- Cost.
- Lack of childcare or care for other dependents.
- Cultural or language barriers.
- Lack of access to technology for communication (for example, phone or internet).
- Lack of transportation.

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[1] There may be instances where a person accessing services will ask to be referred to a service for which the navigator may believe they are not eligible. In this case, navigators are to act with transparency to ensure the person accessing services is aware of any eligibility concerns. Should the person accessing services wish to proceed with the referral, it is their right to do so, and the navigator's responsibility to support them.

While referrals themselves cannot address all these issues, referrals can be made skillfully. Considering the barriers, a person accessing services may face and taking advantage of existing referral pathways helps increase the chances of the referral being effective from the perspective of the person accessing services.

Even though it may be a difficult conversation, honesty, empathy, and transparency will be key when you can't find a suitable fit. You might say something like:

> *"Based on the resources we're currently aware of, it may take us longer than usual to find a good fit. I know this isn't what you wanted to hear, but we will work to find a solution as quickly as possible. Unfortunately, this may take a few hours. I will connect you with as much support as I can in the meantime, and I'm going to consult with my colleagues to see if there are other resources available, or if we can find a compromise through one of the other agencies."*

Make sure you then actively work with your professional network to help the person accessing services find a solution. If the eventual plan is still not a good fit, the person accessing services needs to know the shortfalls of that service for their needs, so they can make an informed decision about if and how they want to access it.

Resources for finding the best referral fit

Your referral networks

Every community seems to have those special informal navigators who have a vast network and knowledge base of services and providers. That same commitment to building and sustaining a referral network is key to the Level 2 System Navigator role and linking this network to your organization and community builds system capacity, especially as people change positions. A strong referral network is essential to delivering the needed outcomes of CA.

Building a referral network starts by:
   a) Knowing individual system navigators.
   b) Registering and joining the Community Compass Level 2 System Navigator's Collective.
   c) Familiarity with organizations in the Grande Prairie area.

Networks develop naturally over time, but you can speed this process intentionally. To build a referral network:

- **Ask colleagues** for formal and informal contacts. If there is already a list, dive deeper. Ask questions like:

- What worked well in the past by referring to this organization?

- What could have worked better?

- Are there key people to know? How do they like to receive referrals, and how do they like to communicate?

- **Keep a list or spreadsheet** of your formal and informal contacts, and add notes about their organization, as well as the outcomes for referrals you've made to them.

- **Share cross-sectoral understanding** of contacts and referral pathways with other Level 2 Navigators in the System Navigators Collective via Microsoft teams or formal meetings.

- **Get out in the community** by attending events, training, and webinars. Introduce yourself, and share your role, what kind of referrals you often make and are looking for, and who can make referrals to you.

- **Create a protocol sheet** to circulate to other system navigators about referral pathways for accessing services at your organization.

- **Update HelpSeeker** with relevant information for other system navigators about referral and intake processes.

Microsoft Teams

Microsoft Teams is an online communication and collaborative system where you can hold discussions with your fellow system navigators, have one-on-one conversations over chat, and view and share documents. You can also start a voice or video call with screen sharing if you need it.

As a result of limited in-person collaboration options due to COVID-19, Teams began to be used to coordinate the daily operations of Level 3 System Navigators. Building on the success of this group, as well as that of many other local coordination initiatives that have also moved online, Microsoft Teams was chosen as the collaborative communication tool for Level 2 and Level 3 System Navigators to use.

(see: Purpose and use of Microsoft Teams)

HelpSeeker digital navigation tools

HelpSeeker offers several resources with real-time information about community services across Canada, including helpseeker.org, community pages, and the Wellbeing Screener app. HelpSeeker's systems map and online resource directories give you access to all health, social, and community services in Grande Prairie and area in one convenient location, allowing you to search anytime, anonymously, for services that will quickly and effectively address the needs of people accessing services. HelpSeeker's products were designed with service providers in mind, to help save time and effort.

The platform allows you to select eligibility criteria that meet the requirements of the person accessing services and helps to bridge referrals more easily. You can also view capacity information in real time, which simplifies the process for matching people looking for help to available services.

HELPSEEKER'S DIGITAL NAVIGATION SERVICES ARE EASY TO USE, AND REQUIRE NO USERNAMES OR PASSWORDS, THUS ENSURING PRIVACY AND SECURITY.

People accessing services can also use them on their own as a resource when they can't reach you.

You can save a search to your favourites list, or forward it to a colleague for quick reference later.

	HelpSeeker.org	Wellbeing Screener	Community Page
	Complete inventory of all help services, helplines, benefits, and social programs in a community.	Easy-to-use anonymous tool that helps you gauge your level of wellbeing along 15 dimensions, including income safety and health, Creativity and connection to nature.	Curated list of top service providers in your area, categorized by specific areas of need.
DATABASE OF OVER 200,000 SERVICES, HELPLINES AND BENEFITS ACROSS CANADA	✓	✓	✓
LOCATION-BASED SEARCH and FILTERING	✓	✓	✓
NO SIGN-UP REQUIRED FOR USERS; PRIVACY IS a PRIORITY	✓	✓	✓
FREE SIGN-UP FOR SUPPORT ORGANIZATIONS	✓	✓	✓
SMART SEARCH BAR	✓		
FAVOURITE/SAVE LISTINGS	✓	✓	✓
WELLBEING QUESTIONNAIRE		✓	
AVAILABLE IN 23 LANGUAGES	✓		
PAID PREMIUM LISTING AVAILABLE (CURRENTLY IN CANADA ONLY)	✓		
USE THIS WHEN			
	❑ You have experience with information and navigation. ❑ You understand the needs of the person accessing services and what types of programs will be helpful.	❑ You need assistance identifying areas that may require attention. ❑ You would like to capture wellbeing status currently or over time.	❑ You need a quick curated list of services available in your community.

Sector-specific knowledge: Knowing where to look

As a navigator, you may need to build knowledge in other sectors to help a person find services that fit their needs. Areas that a system navigator may find useful to learn more about are:

- **Health care**. Learn about locations of nearby health-care services, and frequently required health-care services, and their information websites.

- **Education/school systems**. Identify navigators and resource workers at the schools and educational institutions closest to you.

- **Corrections/justice**. Learn about the referral pathways and inflow and outflow to these systems in Grande Prairie, particularly for legal support and resources for people being discharged from corrections programs and institutions.

- **Population-specific supports**. Learn about supports in sectors in which you are not actively involved. These may include seniors-specific supports, gender-based violence service providers, youth-serving agencies, and others. Get to know the key navigators and other contacts for various population groups.

HelpSeeker Community Page https://helpseeker.org/alberta/grande-prairie/

The HelpSeeker Community Page is a 'cheat sheet' or quick reference tool to allow you or the person accessing services to find the key services in Grande Prairie and area.

Food Services

Food services in Grande Prairie & area

| | Salvation Army GP – Community Kitchen | For anyone who needs a meal – all ages, all genders. Children must be accompanied by a parent/guardian. The Community Kitchen Project is a collaborative effort between The Salvation Army of Grande Prairie and The Grande Prairie Friendship Centre to merge their two existing and independently operated hot meal | View this listing → |

Example of Food Services listed on the HelpSeeker community page for Grande Prairie & area.

JOB SHADOWING

One way to learn about other sectors and systems is by job shadowing, including site tours. Making connections with other navigators, meeting them in person (when safe to do so), and learning more about their services and locations will expand your network and strengthen your ability to support people accessing services.

TRAVELLING TO DIFFERENT SITES GIVES YOU THE EXPERIENCE TO PROVIDE BETTER INFORMATION ABOUT GETTING TO THOSE LOCATIONS.

Pillar 3: Training

Community stakeholders identified the need for a uniform foundation of core training requirements, with additional training on general topics, to most effectively support Level 2 System Navigators who represent diverse roles and agencies.

Community Compass related training will continually evolve as community needs change and the System Navigators Collective members grow and learn together. Frontline staff already trained in the core or equivalent training, will have their existing training recognized. In addition to a thorough understanding of this guide, recommended training for Level 2 System Navigators includes:

- Person-centered Approaches
- Government of Alberta *Information Sharing* online module
- Government of Alberta *Information Sharing in Practice* online module
- Mental Health First Aid course
- Indigenous Mental Health course
- Alberta Health Services Trauma-informed Care E Learning Modules
- Applied Suicide Intervention Skills Training (ASIST) workshop completion
- Alberta Family Wellness Initiative *Brain Story Certification*
- Non-violent Crisis Prevention and Awareness
- Diversity and Inclusion: Cultural Competency in Working with Newcomers
- Diversity and Inclusion: Cultural Competency in Working with LGTBQ2S+
- Seven Cities Online Learning Resource *The Homeless Charter of Rights*
- Digital Tools for System Navigators: How to Use the HelpSeeker Systems Map

(see: Appendix 1)

LIVED EXPERIENCE MENTORSHIP

LEARNING FROM NAVIGATORS WITH LIVED EXPERIENCE OF CHALLENGES, SUCH AS HOMELESSNESS, DISCRIMINATION, OR BARRIERS TO ACCESS, ALLOWS YOU, AS A SYSTEM NAVIGATOR, TO VIEW NAVIGATION FROM A DIFFERENT PERSPECTIVE.

PEOPLE ACCESSING SERVICES ARE THE TRUE COMMUNITY EXPERTS, UNDERSTANDING WHERE TO GO, WHO TO TALK TO AND THE INS AND OUTS OF ADMINISTRATIVE PROCESSES. Some logistical barriers may go unnoticed by frontline staff, but are evident once seen from the perspective of a person accessing that service.

Examples of things a person accessing services might notice, and a navigator might miss, include no pay phones being available for those without cell phones, sidewalks not shovelled for those with mobility challenges, and limited hours of operation for those who work night shifts.

Pillar 4: System Navigator Collective

The Level 2 System Navigators Collective is a community of practice whose members communicate regularly to share materials, trends, and gaps they are experiencing as navigators, and to co-create community best practices. Activities of the collective include but are not limited to:

- Supporting and problem-solving with fellow navigators.
- Using Microsoft Teams as a communication tool.
- Attending quarterly meetings.
- Providing updates on my programs and services.

In addition to regular communication using digital tools, (see: Purpose and use of Microsoft Teams) the System Navigators Collective meets approximately four times a year for in-depth learning and discussion. The time together is used to determine detailed best practices for specific populations, such as Indigenous people, seniors, and others accessing services, and other needs pertinent to the community.

Microsoft Teams

Microsoft Teams is an online communication and collaborative system where you can hold discussions with your fellow System Navigators, have one-on-one conversations over chat, and view and share documents. You can also start a voice or video call with screen sharing if you need it.

As a result of limited in-person collaboration options due to COVID-19, Teams began to be used to coordinate the daily operations of Level 3 System Navigators. Building on the success of this group, as well as that of many other local coordination initiatives that have also moved online, Microsoft Teams was chosen as the collaborative communication tool for all System Navigators to use (see: Purpose and use of Microsoft Teams).

Level 3 Navigators as a part of the collective

Belonging to the System Navigator Collective means connecting with Level 3 Navigators as needed. Currently, Level 3 Navigators are an identified support for the housing and homelessness sector.

Level 3 Navigators with Centerpoint Facilitation Inc. are a one-stop option for people who are experiencing homelessness or housing instability to find the housing service they need in Grande Prairie. Call 780-518-4833 for more information about options for you or someone you are supporting.

Becoming a Registered Level 2 System Navigator

Being a Level 2 System Navigator is a significant responsibility. You are part of the broader Community Compass initiative and have an essential role in meeting our community's needs, by supporting people to access the services they need and to exercise their rights.

All the strategies discussed in this guide will support you in your role as a Level 2 System Navigator, providing tools and techniques to help you put community members who seek services at the center of your work.

Becoming a Registered Level 2 System Navigator

Level 2 System Navigators already, through their role as defined by their agency, provide information, referral and navigation support to people accessing services. Registered Level 2 System Navigators agree to a consistent way of providing these services, and to working together with other navigators in a system based on core competencies and uniform processes.

If you wish to become a Registered Level 2 System Navigator, you must ensure your agency has signed a *Memorandum of Understanding* as a Community Compass (or Coordinated Access) Participating Agency. This agreement clarifies the roles of the agency in the collaborative system. You must sign a *Level 2 System Navigator Agreement* (See Appendix for full agreement), which includes a commitment to participate in the System Navigators Collective.

As a Registered Level 2 System Navigator:
❏ I commit to using Microsoft Teams as outlined in Appendix 3: Purpose and use of Microsoft Teams.
❏ I currently provide navigation support as an employee or volunteer.
❏ I am committed to participating in training opportunities to build the core competencies of a Level 2 Navigator.
❏ As my schedule permits, I am willing to actively participate in the System Navigators Collective.
❏ I commit to working within a person-centered approach to navigation (see Section 2 of this guide).
❏ I can comply with all applicable laws and regulations concerning the confidentiality of client records, files, and communications, in addition to the terms of this agreement.
❏ I am knowledgeable about data confidentiality and client confidentiality rights and can explain these rights to each person assessed.
❏ I agree to collaborate with other navigators to address process issues for the purpose of evaluating service efficiency and effectiveness.

Appendix 1: Suggested Training

To build the core competencies a Level 2 Navigator, the following courses and workshops are recommended:

Course	Objective	Time commitment	Certificate of completion
Government of Alberta [Information Sharing](#) online module	Understand Alberta legislation on information sharing	Approximately 45 minutes	Yes
Government of Alberta [Information Sharing in Practice](#) online module	Case study practice to better understand the concepts of information sharing under Alberta's privacy legislation	Approximately 45 minutes	Yes
Mental Health First Aid course (Mental Health Commission of Canada)	Participants learn to recognize signs that a person may be experiencing a decline in their mental wellbeing or a mental health crisis and apply MHFA actions.	8 hours, broken into multiple modules	Yes
Indigenous Mental Health course (Mental Health Commission of Canada)	It is designed to provide an opportunity for First Nations participants and those who work with First Nations to learn and have serious conversations about mental health and wellness.	20 hours, 8 modules	Yes
Applied Suicide Intervention Skills Training (ASIST) workshop completion	Learn to recognize when someone may have thoughts of suicide and work with them to create a plan to support their immediate safety.	2 days	Yes

Course	Objective	Time commitment	Certificate of completion
Alberta Family Wellness Initiative Brain Story Certification	Designed to support a deeper understanding of brain development and its consequences for lifelong health.	19 self-guided modules. The time it takes to complete the course varies from participant to participant.	Yes
Non-violent Crisis Prevention and Trauma Awareness	PACE	Half day - 1 day	Yes
Diversity and Inclusion: Cultural Competency in Working with Newcomers	Unconscious Bias Training Modules through City of GP	Half day - 1 day	Yes
Diversity and Inclusion: Cultural Competency in Working with LGTBQ2S+	Northreach Society	Half day - 1 day	
Seven Cities Online Learning Resource the Homeless Charter of Rights	Understand a rights-based approach to services from the perspective of people with lived experience and how to support these rights.	Self-paced, online	Yes
Harm reduction	Northreach Society	Varies	
Person-Centered Approaches	Centerpoint Facilitation Inc.	2 days, in-person or virtual	Yes

Optional/free additional training options

Offered by	Training	Web Link
Alberta Addiction Services	Alberta Addiction Service Providers	http://albertaaddictionservice providers.org/training.php
Alberta Health Services	Trauma Informed Care	https://www.albertahealthser vices.ca/info/Page15526.asp x
CMHA - Recovery College	Mental Health Supports	https://recoverycollegecalgar y.ca/courses/
Mental Health Commission of Canada	The Working Mind	https://theworkingmind.ca/w orking-mind
Psychosocial Disaster Network: A Virtual Hub for Psychosocial Disaster Preparedness and Recovery	Psychosocial First Aid (Online training and workshops related to disaster preparedness and recovery)	https://www.albertahealthser vices.ca/info/Page17072.asp x
University of Alberta	Indigenous Canada	https://www.coursera.org/lea rn/indigenous-canada?action=enroll

Appendix 2: Level 2 System Navigator Agreement

System Navigator Agreement and Registration
Policy and Responsibility Statement
GRANDE PRAIRIE AND AREA COMMUNITY COMPASS SYSTEM NAVIGATOR

System Navigator Name:	
Organization:	
Title:	
Email:	
Phone:	

Self-assessment of qualifications as a Level 2 System Navigator:

- ❏ I commit to using Microsoft Teams as outlined in Appendix 3: Purpose and use of Microsoft Teams.
- ❏ I currently provide navigation support as an employee or volunteer.
- ❏ I am committed to participating in training opportunities to build the core competencies of a Level 2 Navigator.
- ❏ As my schedule permits, I am willing to actively participate in the System Navigators Collective.
- ❏ I commit to working within a person-centered approach to navigation (see Section 2 of this guide). I can comply with all applicable laws and regulations concerning the confidentiality of client records, files, or communications, in addition to the terms of this agreement.
- ❏ I am knowledgeable about data confidentiality and client confidentiality rights and can explain these rights to each person assessed.
- ❏ I agree to collaborate with other navigators to address process issues for the purpose of evaluating service efficiency and effectiveness.

By affixing my signature to this document, I acknowledge that I have the qualifications as listed above and that I agree to comply with all Community Compass/Coordinated Access policies and procedures as a Registered Level 2 System Navigator.

System Navigator Signature   Date

Agency Contact Signature   Date

Appendix 3: Purpose and use of Microsoft Teams

Grande Prairie Coordinated Access: Purpose and use of Microsoft Teams

What Is Microsoft Teams?

Microsoft Teams is the communication and collaboration hub of the Microsoft Office 365 product family. Teams is an online tool allowing you to hold discussions with your fellow System Navigators, have one-on-one conversations over chat, and view and open shared documents. You can start a voice or video call with screen sharing as needed.

Who is using Teams?

Both agency and program lead of community-based organizations in Grande Prairie, as well as Level 2 and Level 3 System Navigators, will use Teams. An optional Teams channel will be created for Level 1 System Navigators to connect.

Program/agency leads on Teams

Teams users who are agency leads will be invited to participate and engage in operational and systems planning activities for their specific sector/priority population. Possible Teams groups include food security, families, transportation, and complex needs. Use of Teams by these program or agency leads will be further detailed as group composition is confirmed. The need for a real-time information-sharing and communication platform has become clear during the COVID-19 pandemic, and is an approach the City, Community Social Development, believes should be pursued.

Why are System Navigators using Teams?
Teams began to be used to coordinate the daily operations of Level 3 System Navigators during the Coordinated Access project, with limitations on in-person collaborations due to COVID-19. One specific area where Teams was used successfully was to ensure access to emergency and housing supports for people with that need. Building on the success of this group, as well as many other local coordination initiatives that have moved online, Microsoft Teams was chosen as the collaborative communication tool for Level 2 and Level 3 System Navigators to use.

How will System Navigators use Teams?

System Navigators will use Teams to speak with the rest of the collective in real time about any questions or concerns that require support. For example, a System Navigator at the Public Library

may ask, through Teams, if there are service options available for complex or less-common issues, such as emergency income support outside regular Monday to Friday hours, how to access self-isolation support during COVID-19, or how to decipher the nuances of eligibility criteria as described online for some services.

Rather than problem-solving in isolation, or being limited by their own knowledge, Teams supports system navigators to learn about local best practices from those who know them best, their peers.

Pertinent information and communication updates will also be shared via Teams. For example, hours of service, which have changed often throughout the COVID-19 pandemic, can be shared quickly and accurately in real time.

Oversight of Microsoft Teams

Microsoft Teams will be managed and operated by City of Grande Prairie staff on an intermittent basis. This does not include 24/7 monitoring. Access to Teams and channels is controlled by the City Teams coordinator. Any inappropriate conduct or violation of usage guidelines by someone with authorized access may result in that person losing Teams access.

Security and privacy

Files shared in a channel are stored in that team's SharePoint folder, which can be found in the Files tab at the top of each channel. Files shared in a private or group chat are stored in the OneDrive folder and are shared only with the people in that conversation. It is important to remember that **no personal information is to be shared in Microsoft Teams**. This includes first name, last name, date of birth, or any other information that could reasonably be used to identify someone.

Chat history, user data, and any uploaded or shared information on Microsoft Teams is stored on Canadian servers. All personal information is collected in compliance with section 33 of Alberta's [Freedom of Information and Protection of Privacy Act](). It is the responsibility of Microsoft Teams users to ensure login information is stored safely, and internet access is private and secure when using Teams.

The City of Grande Prairie employs network security measures to monitor for attempts to tamper with information, or to otherwise cause damage to any information contained within City tools and sites. Please be aware that any attempt to damage the system will be pursued to the maximum extent of the law.

Microsoft Teams usage guidelines

DO	DO NOT
● Discuss important items to provide consistent, high-quality access to services for people in need.	● Discuss personal matters not relevant to improving access to services (unless a Channel or Team is set up to do so).
● Engage with other System Navigators to problem-solve on behalf of someone in need. Example: "Can anyone suggest an option for a participant trying to get to Wembley? They said they used to use the County Connector, but that is discontinued."	● Use personally identifying information, including **full names, DOB, personal phone numbers or emails, etc. Adhere to all FOIP regulation and privacy guidelines as you would within your agency.**
● Upload relevant communications, forms, or materials to share. For example: "A reminder the resource centre hours are reduced this Monday due to the long weekend." ● Example 2: "Hey, in case anyone is confused, we rebranded our logo but are still the same agency delivering the same service. Check it out here (link)."	● Upload any personal information (yours or participant). Teams is not a secure way to complete and share referral forms.
● Use Teams to raise issues and complaints that others should know via the appropriate channels. For example: "A participant communicated to me they are disappointed there is no navigator working here on Sundays."	● Use Teams to air personal issues and complaints with identifying information. If necessary, speak directly to the System Navigator Coordinator.
● Use appropriate language and terminology as you would in person.	● Use inappropriate, discriminatory, or unprofessional language.
● Feel free to message individuals directly (privately) or take conversations offline to more secure tools.	Use private messaging to engage in any behavior identified as being against approved usage as described above.

Level 2 System Navigators and further teams use

Level 2 System Navigators occupy an important role in Grande Prairie's Community Compass system, providing a safety net to reduce the risk of people slipping through the cracks or being bounced around from service to service. Unlike Level 1 System Navigators, who rely on the HelpSeeker platform for up-to-date information and do not have access to Teams, Level 2 System Navigators are encouraged to use Teams daily and often, and to create relationships with other system navigators through Teams.

Level 2 System Navigators are encouraged to:

- Create **warm transfer messaging**, alerting other navigators when an individual or family is being sent their way. For example:

    - "Hey Cassandra, someone just asked me if you guys were open and taking walk-in assessment appointments. Just a heads up, someone will be on her way to you within the next hour and is hoping to connect with you specifically."
    - You may use the names of other System Navigators but refrain from using participant names on Teams. Phone calls or secure form-sharing can be used for referrals containing personal information.

- **Refer 'up' to a Level 3 System Navigator via Teams**:

    - There may be situations when someone needs support beyond your capacity. Unless your agency's emergency protocols must be followed, reaching out to coordinate with a Level 3 System Navigator or the System Navigator Coordinator may be the best support for someone who needs assessment.

- **Get to know the System Planning Collective members:**

    - People in need often identify staff with whom they prefer to interact, and locations they prefer to attend. When referring and supporting access to services, find out if the person has a preference or comfort level to consider. Use Teams to communicate with the collective to find the most appropriate service for that person. Knowing who the other system navigators are in the collective, particularly the Level 3 System Navigators, will help you address preferences for gender, ethnocultural group, location, or other elements

Administration/structure of Microsoft Teams

- Only the Microsoft Teams Coordinator can add someone to Teams.
- Please adhere to the channel descriptions for appropriate content.

- Please inform the Microsoft Teams Coordinator of any inappropriate conduct taking place on Microsoft Teams.

Core channels

To ensure messages are not lost and notifications from Teams are not overwhelming the day-to-day productivity of Community Compass agencies and system navigators, the following core channels may be introduced in addition to the Level 2 System Navigator Community of Practice channel:

- **Individual looking for support:** This channel would be for supporting individuals and families in need when they are seeking support.

- **Community resources:** This channel would be to post information and updates on programs and services in the community that are pertinent to the System Navigators Collective.

- **Funding opportunities:** This channel would allow agency leads to post community funding opportunities, share funding achievements, and stay collectively up to date on city funding deadlines.

- **Community Compass process ideas:** This channel would be for adding ideas to improve the efficiency and effectiveness of Community Compass and in particular, the system navigator's role. These ideas can be added as they occur to navigators, and they will be addressed at the next System Navigators Collective meeting.