

Second Century Vision

The 411 on Navigators within Integrated Client Journey

Overview of Navigator Role

In the Integrated Client Journey leading to sustainable quality of living, individuals and families will interact with various roles such as an Information & Referral Specialist (I&R Specialist), Navigator, Case Manager and Coach to name a few. These roles, likely provided by different organizations, will collaborate to best serve clients. An understanding of the differences and similarities of these roles will support the participant's experience on their journey to attain sustainable quality of living. The I&R Specialist, Case Manager, and Coach roles described below are based on trusted sources (i.e., Texas Health and Human Services Commission, Commission for Case Managers, RAISE Texas, Co-Action Coaching).

The Navigator role is based on United Way of Greater Houston's (UWGH) research on best practices. Navigator is a professional who uses a relational, strengths-based approach to help clients articulate and achieve their goals by providing essential referrals and support to clients as they move through their journey to stability. Navigators can be described as empathic, compassionate, non-judgmental, motivating and encouraging.

Navigators are neither case managers nor counselors. Navigators work alongside an agency's case manager, coach, or counselor and use coaching skills to help clients articulate and achieve their goals. They can assist with clients in crisis, resolve conflict and work with diverse populations.

Navigators are generalists, not specialists. What this means, for example, is that special populations, such as survivors of domestic violence, individuals with intellectual or developmental disabilities, and seniors, will engage with a Navigator who does not specialize in any of those areas. For Navigators to successfully work with special populations, UWGH extensive training in coaching skills, trauma informed care, cultural humility, motivational interviewing, cross cultural practice, use of common tools, among other topics.

Because clients live in communities...Navigators are aware of the strengths and resources of the specific community they are serving.

Navigators play a key role in the Integrated Client Journey. They often serve as the initial link to clients in that they will assess client readiness, assist client with determining goals and then provide an individualized pathway to specific services and programs through referrals and utilizing relationships to make connections for specific services. Navigators regularly check-in with clients and referral partners, ensuring client progress along the journey.

Fast Facts

WHAT:

United Way Definition of Navigator and Navigation Team

- Navigators provide essential referrals and support to clients as they move through their journey to financial stability. Navigators can be described as empathic, compassionate, nonjudgmental, motivating and encouraging. Navigators work within a Navigation Team at an agency.
- Navigation Team includes the Navigator, who works full time on Navigation duties, as well as staff members who are partially assigned to direct service Navigation duties and supervision, so that the agency can serve clients without interruption if there is staff turnover.

Second Century Vision

The 411 on Navigators within Integrated Client Journey

Role Comparisons

| Definitions | | | |
|--|--|---|---|
| Information & Referral Specialist | Navigator | Case Manager | Coach |
| A Information & Referral (I&R) Specialist quickly and accurately assesses clients' needs and provides thorough, appropriate, and helpful referrals to address those needs; uses direct intervention and advocacy when needed and agreed to by the client. They conduct follow-up with key target demographics. | The primary function of a Navigator is to connect clients to services through referrals and support. Navigators also assist clients to define goals and then move along their individualized journey. Navigators can be described as empathic, compassionate, nonjudgmental, motivating, and encouraging. Navigators work within a Navigation Team at an agency. | A Case Manager uses a collaborative process to assess, plan, implement, coordinate, monitor and evaluate the options and services required to meet a human service need. Includes advocacy, communication and resource management that promotes quality and cost-effective interventions and outcomes. <i>(Commission for Case Manager Certification)</i> | A Coach uses a client-driven process in which individuals and families work to reach personalized goals related to improving their well-being. Coaches should not provide expertise on their clients' goals, but offer tools and resources, encouragement, and monitoring throughout the process of self-directed behavior change. <i>(RAISE Texas definition of coaching).</i> |

Navigator Key Skills

- Empathic, compassionate, nonjudgmental, motivating and encouraging
- Uses a strength-based and relational approach with clients
- Exhibits cultural humility
- Meets clients where they are
- Allows client to lead
- Strong listening ability
- Knowledgeable of community resources
- Builds a supportive relationship with client throughout the journey

Primary Job Functions

- Assesses readiness for Integrated Client Journey
- Connects clients, when appropriate, to Integrated Client Journey
- Stays current on resources available within and outside the region
- Facilitates referrals within a network of services or service providers
- Utilizes relationships to make referral connections for clients
- Documents all referrals and follow-ups
- Assists in goal development
- Develops consistent and regular client contact

Second Century Vision

The 411 on Navigators within Integrated Client Journey

Navigation Team Setting and Description of Navigation Team Funding

- Navigators work within a Navigation Team at an agency. The Navigation Team will include the Navigator, who works full time on Navigation duties, as well as staff members who are partially assigned to direct service Navigation duties and supervision, so that the agency can serve clients without interruption if there is staff turnover.
- We will build 20 Navigation Teams across all of the 13 regions. Investments of UP to \$100k are available for each Navigation Team. Each agency may only request navigation funding for up to 2 regions. While a Navigation Team is housed at an agency, the Team must serve clients in the entire funded region.
- Agencies must assign a minimum of one full time Navigator, a portion of other staff members who will act as a backup to the Navigator, and a portion of the supervisor to the Navigation Team.

Allowable expenses

- Allowable expenses include the Navigator salary, benefits, cell phone, supplies, laptop, mileage, and the pro rata share of backup staff salary and benefits and pro rata share of supervisor salary and benefits.

WHERE:

UWGH will invest a total of \$2m for ~20 FTE Navigator Teams to cover all identified regions.

Link to regions:

<https://public.tableau.com/profile/unitedwayhou#!/vizhome/SecondCenturyVisionRegionProfiles/InteractiveRegionalProfiles>

HOW:

- Operates within a team setting
- Is client centered
- Serves the entire region, across programs and agencies along integrated client journey and works with clients beyond own organization
- Provides referrals and follows-up with client along their journey
- Participates in convenings for all Navigators (led by UWGH) across all regions as well as convenings within their own region
- Appropriate Caseload will be determined in collaboration with Navigator Teams, United Way and using available data on regional needs

TOOLS and Helpful Training:

Navigators will use common set of tools

- Client Readiness Tool
- Navigator Partnership Agreement
- Client Informed Consent
- [United Way Pierce County's Self-Sufficiency and Well-Being Matrix](#)

UW is committed to providing the following training to funded navigators

- Training on Client Readiness Tool
 - Stages of Change + Powerful Questions

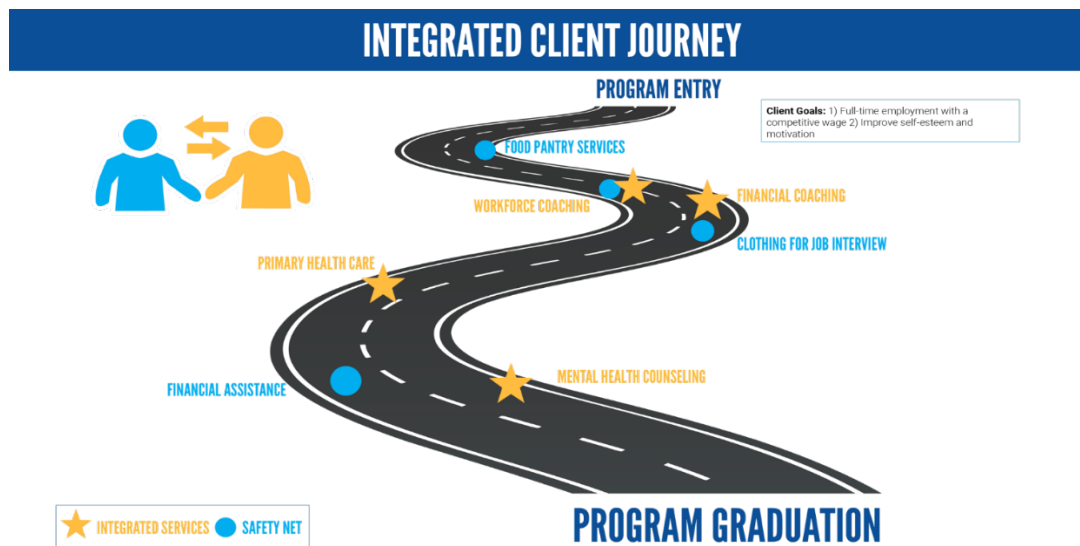
Second Century Vision

The 411 on Navigators within Integrated Client Journey

- Listening for readiness
- Training on Navigation Partnership Agreement
- Training on Informed Consent
- Training on UW Pierce County's Self-Sufficiency and Well-Being Matrix
 - Explore domain areas that are difficult to discuss with clients
- Training on Visioning and Goal Setting
- Coaching Mindset and Coaching Skills
 - Coaching as mindset
 - Coaching definition and distinctions
 - Coaching competencies
 - Coaching Model – COACH
 - Levels of listening
 - Powerful questions
- Overview and Training on Community Resources ([211 Texas/United Way Helpline](#))
- Training on Trauma Informed Care
- Training on Implicit Bias
- Training on Cultural Humility and Cross-Cultural Practice
- Training on Motivational Interviewing
- Training on Impact of Mental Health and Substance Use Disorder for Individuals and Families
- Training on Working with Special Populations (such as survivors of domestic violence, LGBTQ+ population, individuals with disabilities, veterans, multi-status households, and seniors)

Client Scenario/Navigator Story

Below is an actual example of Navigation at work:



Mary came in seeking a job as she had been laid off. Mary had very little savings and was struggling with motivation and confidence as she hadn't been able to find employment for some months. Mary used to be financially stable and would always donate to organizations in need. She never thought she would need to seek assistance and at first she felt embarrassed about seeking assistance.

Second Century Vision

The 411 on Navigators within Integrated Client Journey

Her Navigator, Evelyn, helped Mary define her goals and also let her know that it was okay to ask for assistance until she gets back on her feet. Evelyn was able to refer Mary to a food pantry where she received food assistance. After receiving food, Mary felt so proud for following through with the referral and expressed how grateful she was for getting connected with food pantry, which allowed her to stretch her savings.

Evelyn also provided Mary a referral to an employment coach who assisted her in updating her resume to reflect demands and skills for the current job market. Mary also got a referral to a financial coach so she could continue working to stretch her savings as much as possible by creating a budget.

Along her journey, Mary was able to schedule a few interviews, but lacked professional clothing. After conferring with her Navigator Team members, Evelyn referred Mary to an organization who provided her with a suit and shoes for her interview. A team member also suggested to Evelyn that Mary could be connected with an organization to help her get a gas card to get to her interview. Evelyn helped Mary successfully acquire a gas card.

During this time, Mary had a health concern that needed immediate attention, but due to limited income, she couldn't go to her previous doctor. Evelyn was then able to connect with a community health clinic that immediately scheduled her that same afternoon. She was able to get those health concerns resolved, and make it to her job interview.

Mary was hired, but due to the economic downturn from the pandemic just 2 weeks later she was laid off. She shared with Evelyn that she was feeling depressed and not confident in herself due to being laid off once again. Evelyn connected her with mental health counseling services. After several counseling sessions, Mary expressed that it has helped her, and she would like to continue with therapy.

Mary recently gained full-time employment with the opportunity for a raise within 90 days and potential to move up the career ladder in the future. Mary was able to overcome many challenges in her path with her Navigator Evelyn walking beside her and supporting her toward her goals.

This is a just one example of how a journey may look in practice but each client's journey will be unique and personalized.

Second Century Vision
The 411 on Navigators within Integrated Client Journey