win

JULY 2021

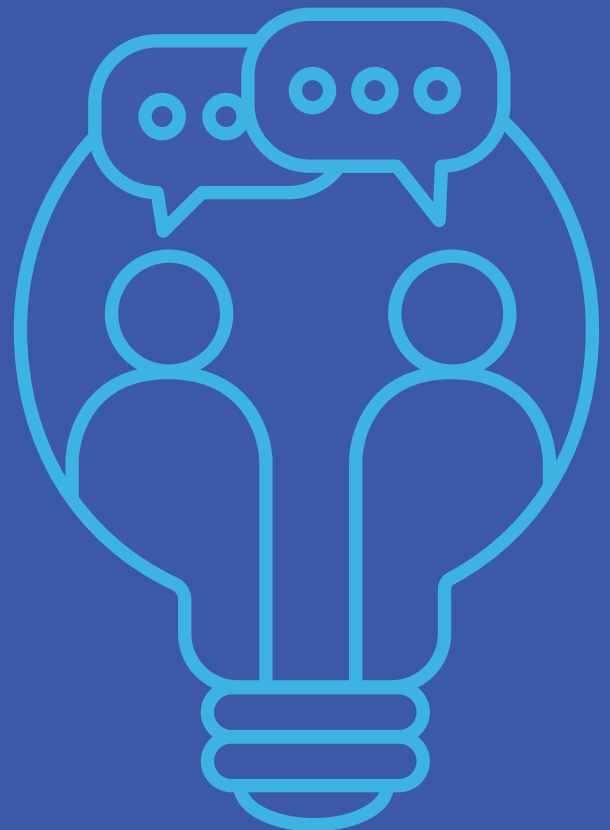**WIN POLICY BRIEF SERIES**

Insider Expertise

Client Insight Groups as a Tool for Policy and Advocacy in Transitional and Supportive Housing

By Eric Goldfischer, Josefa Silva, and Jessica Yager

Introduction

For far too long, policymakers in New York City have designed plans to address homelessness without speaking to the families impacted by it. As a shelter and housing provider that also advocates for policy solutions, Win wants to be part of changing this approach, by including families experiencing homelessness in the proposal and development of solutions. This year, Win added a new component to the development of its annual policy agenda. This report has historically been informed by the expertise and research of Win staff, and informed by work with Win residents and data. This year, as we developed our policy agenda, we took the opportunity to engage with residents in a more comprehensive way. The mayoral race and other political changes that will take place in New York City this year provide a singular moment to help shape the approach to homelessness for the coming years, and we recognized that now was the time to invest in a deeper partnership with our residents in developing Win's agenda on homelessness for the next administration. The report that emerged is entitled *Every Family Housed: A Blueprint to End Family Homelessness for the Next Mayor*.

This brief outlines the process Win's team undertook to center people with lived experience in our policy work; in other words, how we incorporated Win residents' experiences and expertise into the setting of our annual policy agenda. We also consider lessons for next time. We have synthesized this experience for our own benefit, but also because we hope that this brief might encourage others to adopt the practice of centering people with lived experience in policy conversations. Because they have such close and regular contact with so many people who experience the direct implications of public policy, social service organizations like Win are in a unique position to facilitate and champion this type of engagement. We plan to continue and expand our work in this area, and hope to contribute to this model for other organizations.

Background

As New York City's largest provider of shelter and supportive housing for families who have experienced homelessness, Win continuously examines and improves its policies, practices, and programs to ensure that they are effective, trauma-informed, and put the housing stability and well-being of families above all else. In addition to supporting families with direct services, Win advocates for systemic reforms to address the structural drivers of homelessness and improve the programs and systems set up to help families struggling with housing instability.

Win's system change efforts are bookmarked with the release of a policy agenda each year. This annual policy agenda advances a nuanced understanding of the family homelessness crisis in New York City and puts forth policy solutions to address the most pressing issues facing families experiencing homelessness. The agenda is shaped by the expertise and research of Win's leadership team; Policy & Advocacy team; Research, Evaluation, and Strategic Learning team; and by the staff who work directly with residents in Win shelters and supportive housing. However, examined through trauma-informed principles, including the key pillars of empowerment and collaboration, we determined we could do better on a crucial component: engagement with and inclusion of families with direct experience with homelessness in the development of our policy platform.

New York City's 2021 election season and the changing of the guard at City Hall that it will bring presented an unusual opportunity to influence the discourse, policies, and programs impacting families experiencing homelessness for years ahead. With the next Mayor, Council Members, Comptroller, and other top elected officials committing to a vision for the future of New York City, Win recognized that we had a unique opportunity to influence future city policy proposals and to meaningfully involve people with lived experience in the shaping of that policy agenda. To help achieve this goal, our team undertook its traditional policy work and planned and conducted insight groups with Win residents.

Through insight groups, Win's team policy team spoke with families directly impacted by homelessness and brought their perspective and expertise into Win's policy report and recommendations. In group discussions, we explored issues and solutions for housing, homelessness, and social services, without narrowing discussion to a pre-determined policy issue or research question. This marked Win's first deliberate engagement with families to shape Win's policy platform by exploring broad, system-level thinking. The insight groups helped to ensure that Win families shaped Win's policy and advocacy vision and priorities at a key time in New York City.

What is an Insight Group?

An insight group is a highly participatory, facilitated conversation in which participants share their expertise through a range of activities that are designed to bring out different perspectives based on lived experience. Adapting this model at Win, our goal was for the groups to create an environment in which participants felt empowered to share not only their stories, but also their analysis of how their stories fit into the larger, systemic picture. As designed by Win's Policy and Planning team, the insight groups drew on several models: Participatory-Action Research (PAR), Popular Education, and Civic Service Design. All three of these models begin in the belief that the people most directly impacted by an issue must be understood as the experts on that issue.

The goal of our insight groups was to provide a comfortable and open space for Win residents to share their thoughts about what New York City should do to support homeless families and ultimately end homelessness.[1] We wanted to ensure that the format was open enough to allow the conversation to be shaped by the participants. We also wanted to have the opportunity to share back the product that was informed by the groups, and to provide an opportunity for participants to provide feedback and input on next steps. To these ends, we designed our insight groups as a two-session process that involved a number of popular education activities, in which participants draw on their own expertise and experiences to generate shared knowledge. The groups were facilitated by a team of Win staff, all of whom had substantial background and training in group facilitation. Win's policy team worked with this group of facilitators (which included Win social workers and members of Win's Research, Evaluation, and Strategic Learning team) to design and organize the sessions. In total, we had 35 residents participate in a total of 6 sessions. Clients who participated were compensated for their time with prepaid Visa cards.

Session 1

The first session began with personal introductions, explanation of the purpose for the group, and review of ground rules for discussion in order to set the parameters for the group and ensure the confidentiality and safety of participants. For the first activity, we asked participants to provide their position on three statements about homelessness. These statements aimed to give participants key ideas in which to ground conversations, while provoking initial thoughts and discussion on homelessness as a structural, city-wide issue that manifests as barriers at the personal or individual level. One statement focused on the connection between homelessness and the lack of affordable housing in New York City, to introduce the structural side of the homelessness conversation; while the other statement focused on the effectiveness of the current homelessness services apparatus, which tied to the individual's experience with the system. Participants ranked their level of agreement or disagreement with the statements on a scale from 1 (strongly disagree) to 10 (strongly agree), and facilitators asked participants why they chose particular rankings, focusing on the ends of each spectrum. This elucidated ideas and began to produce themes, which would be further fleshed out over the course of the session.

The second activity built on the ideas generated through the agree/disagree activity to move into a deeper exploration of the roots of homelessness. Working with the themes that emerged in the first activity, the facilitator posed the "why" question. When a theme emerged around a lack of affordable housing for people trying to leave shelter, for example, participants shared

---

[1] Insight groups were also held with Win staff, though the focus of this brief is engagement with residents in Win shelters and supportive housing.

their experiences struggling to find housing, even after obtaining a rental assistance voucher from the city. The facilitator then provided context—deepening the roots of the problem—by helping participants connect source-of-income discrimination to other forms of housing discrimination that are baked into the city's landscape. Meanwhile, one of the other facilitators took notes, bringing together related ideas into a diagram that ultimately showed the roots of the current crisis, informed both by the experience and knowledge of participants.

For the final activity, participants moved into smaller groups for focused discussion on one of the following issues: services in shelters, preventing homelessness on a systemic level, and affordable housing for those exiting shelter. Breaking into these groups allowed participants to share in a different way: first by creating a space for those reluctant to participate in a large group, and second by allowing participants to dive into the area in which they were most interested. These breakout groups began with a silent reflection, followed by a less directed conversation to allow for a different way of approaching the discussion. Additionally, we began to focus on solutions in these groups, shifting from laying out problems with our current situation to a solution-oriented space. This gave participants and facilitators the opportunity to create ideas together, many of which appeared directly in the subsequent policy report produced by staff.

Session 2

At our second session, we presented the report to participants and solicited feedback. The second meeting also began with introductions and ground setting, and then again split into small groups where a facilitator reviewed the policy report with participants. This review provided crucial validation, as participants were able to see their own ideas from the first session reflected in a prepared report. It also spurred conversation—after sharing the main takeaways of the report, participants reflected on the proposals, and the conversation inevitably hearkened back to the solution-focused

breakout groups that ended our first gathering. Our final insight group activity took advantage of the specific context for this report—the 2021 New York City Mayoral Election, which is taking place at a crucial moment for addressing homelessness, as the COVID-19 pandemic recedes and eviction moratoriums are set to expire. In our final activity, we created an improvisational theater setting of a mayoral debate about homelessness. Participants and facilitators split into two groups—one group of candidates, one group of participants asking questions. During the exercise, one of the facilitators acted as moderator and asked the group of candidates a series of policy questions focused on family homelessness. After each of the candidates had responded, participants in the audience got to ask their own questions, before the groups switched places so that everyone had the opportunity to improvise as both a candidate and an audience member. In many ways, this activity served as the summation of the insight group experience. It gave participants the opportunity to apply policy knowledge gained through both lived experience and through the collective analysis produced through the insight group. After the exercise, many remarked that the conversation was more substantive than other "professional" policy conversations surrounding homelessness, an observation that shows the importance of including lived experience in all policy settings.

Impact

Centering those with lived experiences is necessary to ensuring that public policy and social service systems are client oriented and reflect the priorities of those using them. It makes for better policy. The insight groups created an avenue for people who are currently or formerly homeless to be involved in the creation of a policy report with a wide audience, and to shape the priorities and agenda of a prominent policy advocate. By doing so, the insight groups brought greater depth and expertise to Win's understanding of the homeless services system. The expertise and other contributions of families who participated in the insight groups brought to the forefront new understandings of issues and new solutions, while also confirming the centrality of a number of Win's existing policy priorities.

Throughout the groups, we heard consistently from participants about the problems and limitations with housing subsidies and housing search assistance. This was already an area that was at the top of Win's policy agenda. But, hearing many participants detail the challenges they face because of poor administration and landlord discrimination led us to delve more deeply into those areas in our report and to highlight them in our agenda. In addition, by sharing back the work that Win already had been doing in this area (advocating for the passage of Intro 146, a bill that raised the value of the CityFHEPS voucher), we were able to share back knowledge that became of immediate practical use for participants. This mutual sharing of information builds trust, a key step in ultimately developing advocacy leadership for those who have been disempowered.

A number of other key themes emerged from our conversations that directly informed our policy report. For example, participants spoke about how critical mental health services are to help families remain stably housed, and how difficult it can be to access them (both in shelter and in the community). We emphasized this area in our agenda because of what we heard in the groups. Some also commented on the siloed nature of government agencies and how hard it is to navigate the many bureaucracies that are necessary to receive the services they need. These conversations informed the development of our recommendation for the city to take a new approach to ending homelessness that works meaningfully cross agency, guided by City Hall, and the need to take a holistic view of families' needs within social service agencies.

Participants also talked about how limited workforce development options and requirements are within the welfare system aimed at helping people achieve employment, and how little attention or support there is for individuals' career goals, like pursuing educational goals or supporting entrepreneurship. Based on these conversations, we developed a set of recommendations in the report around the need to expand workforce development programs.

Holding these groups also benefited our policy and advocacy work because it helped us identify people who were interested in working with us on advocacy by, for example, speaking to the press or asking a question to the candidates at our mayoral forum. As we discuss in the section below, we plan to find ways to expand this engagement with participants in the future, but even this time around we were successful in using the groups to provide opportunities for some of the participants to advocate on a more public stage.

Perhaps just as importantly, the groups themselves gave participants a chance to fuse their own experience-based knowledge with the collective historical and political knowledge of housing and homelessness generated by the group through our activities. As one participant remarked, participating in the groups provided a valuable space for "engaging with others who have similar experiences like myself." Another participant, a resident of supportive housing, noted that the groups inspired her to once again become a housing ambassador, helping others to resolve issues in their housing situations. In their ability to hold space for both action and reflection, the insight groups created a sense of empowerment that participants took with them beyond the groups themselves.

Lessons for Future Insight Groups

From our point of view, this first foray into insight groups was a success. We facilitated engaged conversations with both shelter and supportive housing residents, which appeared to be of value to them and helped shape Win's policy agenda and understanding of the challenges those families face. At the same time, there were challenges in the process that provide useful lessons for future insight groups.

First, participants will have questions and concerns that they want to raise that are not on the agenda, and facilitators need to be open and ready to respond.

While the activities we designed for this exercise were purposefully open-ended and broad, intended to elicit honest responses and only minimally lead the conversations, the focus was policy reform. Specific policy reforms, however, were not the only thing—or even the primary thing—that participants wanted to discuss. When participants introduced themselves at the beginning of the first session, they were asked to share why they signed up or what attracted them to the group. In varying terms, the majority said they were there to get information and learn about programs and resources that could be helpful to them. Many also came to the group to resolve individual needs, complaints, or issues they were experiencing. This expectation of the insight groups likely reflects what clients have experienced in the service context: a staff expert and problem solver providing information and answering questions to help clients meet an immediate need or goal. It also highlights how hard it can be to think about more abstract issues when one's immediate needs aren't met.

This presented a challenge for facilitation. From the perspective of the Win team, addressing the present needs of participants was not the purpose of the groups. Similarly, groups were structured for participants to contribute information and feedback, and not to be in the role of receiving help. But facilitators recognized the importance of being open and perceptive to what participants brought to the table—whether a personal issue or a recommended policy reform—and guided a conversation that met each participant where they were, which provided a benefit to all. Next time we will more intentionally plan for this eventuality. Any project like this must grapple with how to be receptive and responsive to the issues raised by participants, regardless of whether they are on the agenda or not.

Second, collecting feedback from participants is critical but sometimes hard to accomplish.

At the end of the first insight group session, facilitators asked participants if they would be interested in a follow-up discussion. All indicated that they were, and remarked on what a positive experience it had been to connect and discuss with others, and how powerful it was to feel heard.

However, we also administered a survey to collect more detailed, anonymous feedback. We used both a text-message and e-mail-based survey, but only a few participants responded. From those who did respond, we heard positive feedback. As noted above, participants who responded noted positive takeaways from the groups, and left feeling empowered to continue to advocate for housing justice. Some respondents also noted some takeaways at the level of shelter advocacy— for example, one participant said that she resolved to get out of transitional housing faster and to "keep looking for a place that takes CityFHEPS," while another expressed increased interest in holding case managers more accountable in their work. But, next time, our team

will work harder to collect feedback from a larger share of participants. This is critical to understanding the impact of the group on the people participating in it and how we can make the process more accessible and worthwhile for Win residents.

Third, the transient nature of shelter makes long-term engagement with residents on policy reform challenging.

Ideally, Win's engagement with residents on policy advocacy wouldn't end after these two sessions. In the future, we would like to move towards a model where we are not just developing Win's policy agenda alongside Win residents, but we are also working with residents to develop and implement advocacy strategies. The fact that residents have many demands on their time and are only in Win shelters temporarily are substantial barriers to this goal, but the Win team is exploring how to extend this collaboration with residents in the future.

Conclusion

Social service providers often have limited resources to devote to policy development and advocacy. Engaging with clients to shape those policy efforts requires even more bandwidth. Social service providers, however, have a unique opportunity and vantage point from which to partner with the clients they serve to develop a truly informed and impactful policy agenda. We hope that more organizations and funders will move towards this model, as centering the experiences and expertise of families directly impacted by homelessness provides a valuable and necessary perspective on both the current challenges they face and the efficacy of policy solutions. Based on the success of these insight groups, allowing us to build a stronger and more informed agenda, we plan to expand this model in the future, both for the purpose of learning from each other, but also so that we can create more spaces of reflection and shared knowledge to effect change for families experiencing homelessness.

win

ABOUT WIN

Win is New York City's largest provider of shelter and services for homeless families with children. Across its shelters and supportive housing, Win transforms the lives of New York City's homeless women and their children by providing a holistic solution of safe housing, critical services and innovative programs they need to succeed on their own—so the women can regain their independence and their children can look forward to a brighter future.

/winnyc.org

@winnyc_org

@WINNYC_ORG

winnyc.org