**The Navigator Manifesto**

*Below are some things that patient navigators keep in mind when working with clients. They were collected from a series of webinars in which patient navigators from nine sites nationwide discussed what they have learned from their experiences working with clients in the HRSA SPNS initiative* Building a Medical Home for Multiply Diagnosed HIV-Positive Homeless Populations.

**Be your client’s "go-to person".** Clients who are homeless may already have complex life circumstances. Help decrease that anxiety by becoming a single point of contact in a system of care that may already have many moving parts. Become as knowledgeable as possible about resources your client can access and familiarize yourself with individuals who can help your client accomplish their goals (this includes but is not limited to housing providers, medical care providers, landlords, legal supports, transportation systems, social supports, etc.). Talk with your clients about past experiences accessing services and working with different agencies. Find out what has worked for them and what has not and, most importantly, familiarize yourself with their style of accessing services. Be your client’s link to a collaborative network of supports.

**Set realistic expectations.** Clients hear many different things from their respective communities and may present before you with many kinds of expectations. To ensure success, from the outset, outline what you are and aren't able to do. Also, have a serious discussion about what your client's responsibilities are. Work closely with outside service providers who may be referring clients to you to ensure they have a complete understanding of what services your organization is able to provide. Be honest, be compassionate, present the facts, collaborate to set realistic goals.

Under-promise and over-deliver to create a trustful working relationship with the client. Always remind the client that they set the agenda and that they are in charge. You are merely assisting them. Also, ensure them that it is ok to switch direction if they choose to do so.

**Educate and empower.** Your client may not have previously had a support system that allowed them to become self-sufficient-- assist the client in setting realistic goals. Make sure they have the tools they need to complete the tasks that allow them to reach these goals. Roleplay unfamiliar situations such as interviews with potential landlords or other situations a client may be inexperienced with. Remind clients they have choices and that their opinion matters. Encourage them to speak up when they have been mistreated. Role model the use of "I statements" ("When you speak to me in that tone, I feel disrespected"). Remind them of all the different perspectives things can be viewed from.

**Don’t talk about it, BE about it.** Show, don't tell. Present your client with concrete facts and visuals that improve their overall understanding of the goal they have identified. Work with the client to anticipate potential problems before they materialize. For example: budget with them before moving into housing to familiarize them with common, but sometimes hidden, day-to-day expenses associated with being housed. Minimize their potential anxiety by underscoring that you are always available to help "troubleshoot" problems.

Also, when possible, accompany clients to appointments and model communicating with service providers. Remember: you are a role model .

**Know yourself.** Although you may have had training in cultural competency, trauma-informed care and motivational interviewing, there may be clients who you may not have a natural rapport with or may even find especially difficult to work with. That's ok. Recognize when you have a client you may not be able to collaborate with by asking yourself honest questions: are you identifying too closely with a client? What are your own feelings about a situation? Talk things through with a colleague when you feel yourself being drawn into a working relationship that makes you doubt yourself, your relationship with the client, or your ability to work effectively with a client.

**Don’t take it personally**. Sometimes a client may get angry with you, especially if you aren't able to provide something they need or want. It's easy to personalize some of the feelings a client may verbalize. Remember that your clients may have a lot going on in their lives and, in some cases, have serious histories of trauma. When clients feel disappointed, sometimes it helps to just be present without trying to solve anything immediately. The important thing is that a) the client feels comfortable enough to vent to you and b) you're able to hear them out without judgment. Some problems have solutions, some do not.

**Don’t work harder than the client.** When you see a client suffering, it’s natural to want to do everything in your power to help. Back off and listen for cues from the client about what they're ready to do and what they may need from you. Ask questions to determine what they are able to do for themselves. Put together a plan, and make it clear what you are and aren’t able to do. Work smarter, not harder--in partnership with the client, not for the client.

**Let people learn from their mistakes.** We all learn from failure—it helps us to build resilience. When a client experiences a relapse or setback, be their mirror—reflect back what you see happening with the client, without judgment. What did they learn from the experience and how can they do things differently next time? Reassure them and remind them that you are an ally through thick and thin.

**Put yourself first.** There’s a reason the airline says “Put on your own oxygen mask first before assisting others.” Navigators spend a lot of time with clients who have very real problems and needs; the open-ended nature of being with clients in the field for an undetermined amount of time can be emotionally draining. It is only when you take care of yourself first, establish some boundaries about when you are and are not available for your clients, and make sure your own needs are being met, that you can effectively support your clients for any length of time. It’s OK to turn off the phone sometimes. Take time off for self-care so that you can be at your best when collaborating with clients.

**Lean on your team.** Training will only take you so far. Situations may occur that make that little voice inside you ask, “Did I do the right thing?” Sometimes you might feel completely out of your depth. Or you may just feel overexposed and need a break. At times like that, talk things over with a teammate. Use clinical supervision to discuss details and potential concerns. Try to identify why a situation or individual might provoke unfamiliar emotional responses. Through this, you gain confidence and increase your skills as a navigator.

**Celebrate success.** Success comes in many forms, big and small. Validate any positive change in behavior, no matter how miniscule. Your client showed up for an appointment for the first time? Made a phone call? Maintained their equilibrium in a difficult conversation? Reflect back the growth you see in them. It takes small steps to make big changes and no success is too small to recognize.

**Keep in touch**. Check in on your clients just to see how they are doing This is especially important when someone is going through a change—moving into a new place or getting a job, for example. Let them know they can contact if they need anything. Checking in shows that you are thinking about them and that you genuinely care about their well-being.