·FOUNDRY·

WHERE WELLNESS TAKES SHAPE

Appendices

Supplementary Materials for the Foundry Start-Up Guide | June 2020

Supplementary Materials

Additional material
available on the
Foundry Website.
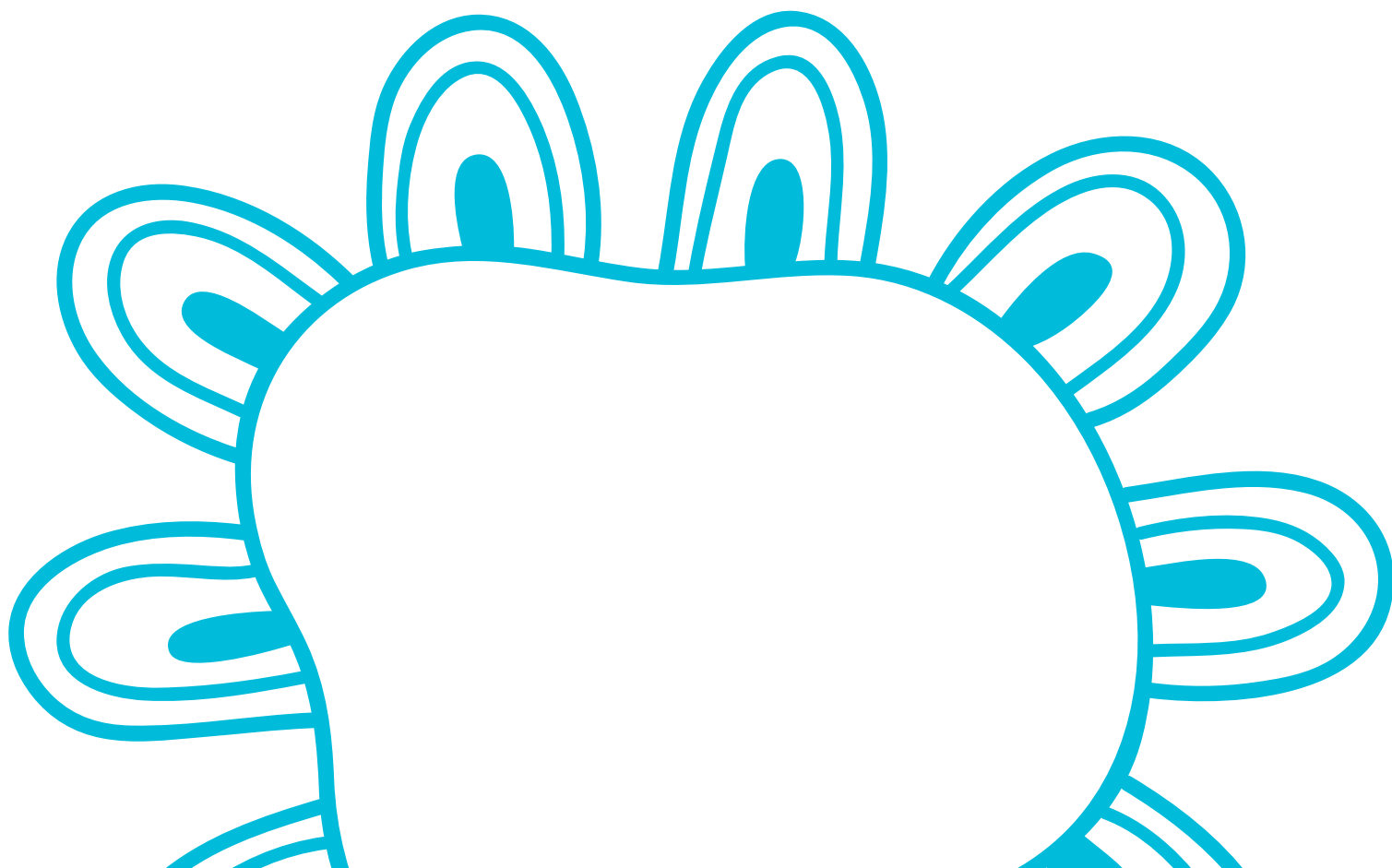
Project Planning Overview

*Available as Microsoft Excel files.

Project Charter – Guidance

Context – When to use

- The Charter is developed after discovery in the planning phase of a project to provide a framework and obtain agreement. It outlines what you are trying to achieve—goals, objectives, roles and responsibilities, stakeholder identification, project organization, scope, etc.

- Revisit the Charter at key transition points in the project (ie. Change in sponsor, change in project manager).

Purpose – Why to use

- It serves as a reference of authority for the future of the project and outlines key components of the project's goals, key members, stakeholders, constraints, etc. It serves the purpose of designing and authorizing the project.

Guidance for use – How to use

- After the Discovery stage, create a draft; then review with Sponsors/key project members to develop further through consultation.
- Following consultation, take to Sponsor for sign-off and final authorization. The Charter can evolve during the project lifecycle (i.e., if scope changes), but key components of the charter should be complete prior to workplan development.
- Refer to definitions embedded within the Project Charter for further clarity on key charter components.

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Project Charter

Project:	Foundry (Name of Community)

Version	1.0
Document Owner	
Start Date	

Approvals/Reviews	Signature	Date
Executive Project Sponsor(s) *Project Sponsor – is a person or group who provides resources and support for the project to enable success* [Name & Contact]		
Project Sponsor(s) *Project Manager/Lead – is responsible for the day to day operations of the project* [Name & Contact]		

Contacts

Project Title	[Insert Project Title]
Project Manager(s)	[Insert Project Manager Name] [Title (If Appropriate)] [Email address] [Phone Number]
Project Sponsor(s)	[Insert Primary Project Sponsor Name] [Title (If Appropriate)] [Organization or Agency] [Email address] [Phone Number]
Document Owner	[Insert Principal Author Name] [Title (If Appropriate)] [Email address] [Phone Number]
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Status	Draft

Document History

Version	Date	Author	Description of Changes / Comments
1.0			*Log each version of the document created*

Note to Author

This template serves as a guide; sections can be added or deleted to fit the needs of the project. The level of detail is therefore flexible and the effort required to complete this document should be gauged according to the size and complexity of the proposed project. All sections within this template can be easily modified or sized to facilitate customization.

Any important information that does not readily fit within the structure of this template can be included at the end of the document. Inclusion of other supplementary material (supporting documentation, etc.) should be incorporated into the Appendix.

This general instruction page and the guidelines/examples that follow throughout the document indicated by *[blue italics]* should be deleted when this document is complete and submitted for final review.
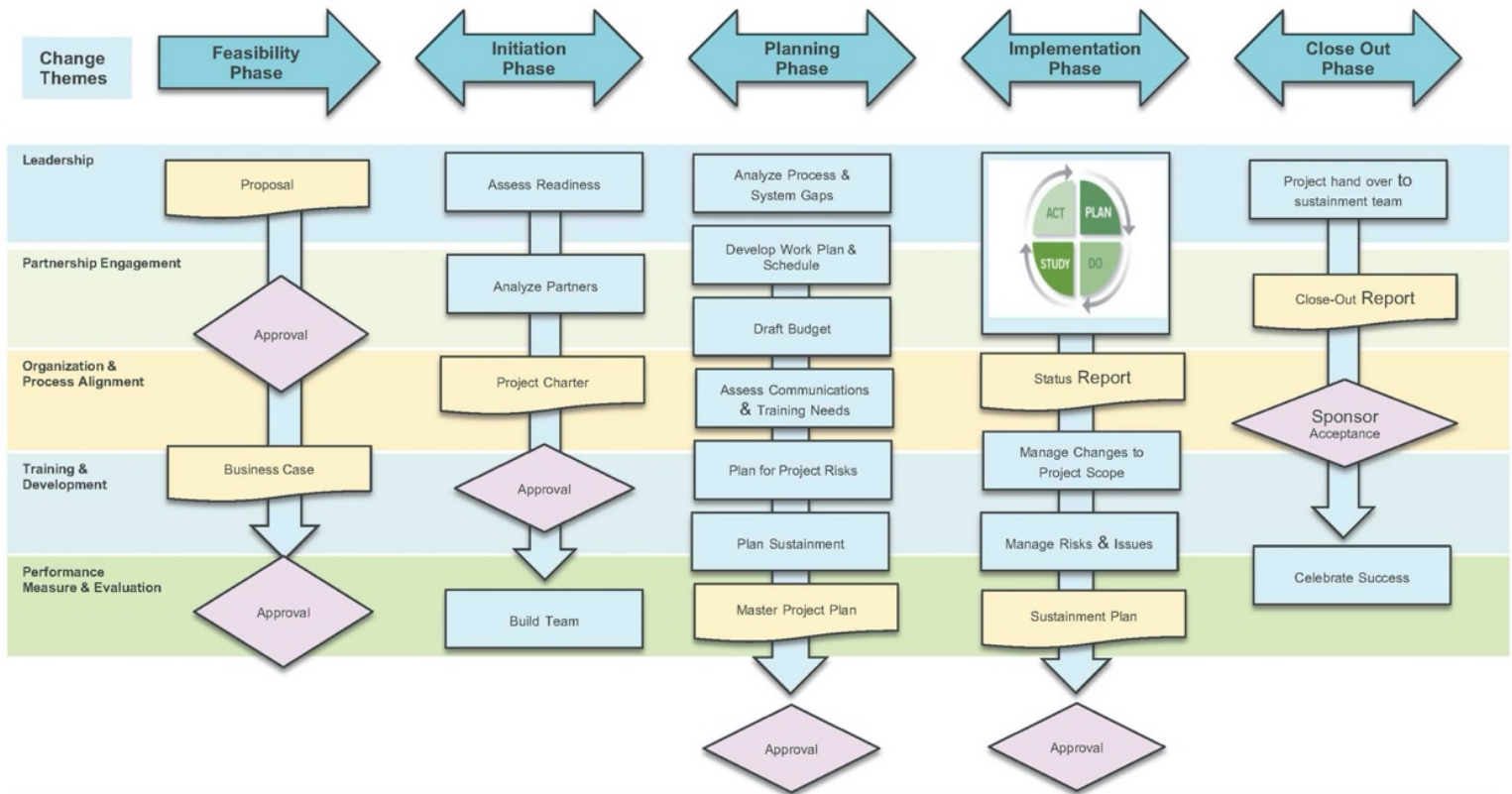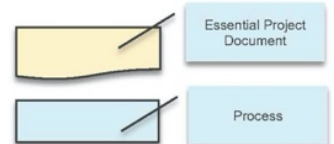
Table of Contents

1. Project Purpose

To open a Foundry Centre in (Community Name), BC by Date/Year.

This project focuses on the implementation (Capital, Services and Operations) of a Foundry Centre.

The aim of this Foundry Project is to provide:
- Easy point of access to ease navigation and find support and services
- Bring partners together and work in the same location, integrate care and services
- Build or renovate space to create a new and purpose built centre
- Develop community partnerships to support the Foundry model
- Provide clinical and social services for youth

2. Background

Foundry provides early intervention services to support young people's wellbeing. The Foundry model unites mental health care, substance use services, primary care, peer support and social services for young people ages 12-24, through the development of a network of centres and e-health services. By bringing together a variety of health and social services under one roof and working in partnership with young people and families, Foundry helps young people get the help they need when they need it.

Foundry (Community Name) will provide young people with multiple services integrated under one roof. The core services will include: primary health care (e.g. physical health, sexual health), mental health and substance use services, social services (e.g. vocational, educational, financial services) and youth and family peer support. The Centre will also include additional services based on local needs, to be determined in the service planning and functional programming processes.

Foundry (Community Name) will help remove barriers to care by bringing together services and supports for young people and their families into one location. Instead of having to

navigate an array of services themselves, and re-tell their story several times, young people will be able to walk through one door to get the help they need.

Foundry (Community Name) will be holistic, meaning it does not just focus on one area of support, such as mental health, but brings together services based on what each young person needs. It will also increase access to care by providing weekly walk-in hours, and no requirement for referrals. Foundry is built on youth and family participation in service delivery design, incorporating their input at all levels of decision making to more effectively meet their needs.

Foundry (Community Name) will be operated by (Lead Agency Name). The development of a Foundry (Community Name) will involve the coming together of existing youth-focused community-based services, resources and organizations to ensure centres will be able to provide the full range of services with an integrated approach.

3. Objectives

The objectives of a project are high-level or strategic goals of the project. They should be as SMART (Specific, Measurable, Attainable, Relevant and Time-bound) as can be articulated at this point of the project lifecycle. The must be SMART by the time they are revisited in the project planning stage. All stakeholders (project client, target users, steering committee, etc.) must be informed of, and agree on the objectives.

Enter the strategic level objectives of the project, focusing on how the project will make a difference.

• Build a Foundry Centre by (insert date), 2020
• Open a Foundry Centre by (insert date), 2020
• Create Leadership tables (Funders, Leaders, Operations, Youth and Family) and terms of reference
• Create and implement a fundraising strategy
• Implement the Integrated Stepped Care Model (post opening)
• Implement Primary Care
• Develop operational plans (including: policies, procedures, governance and management structures, etc)
• Recruitment of physicians and staff
• Develop a Human Resource plan including: staff rotations, training and orientation
• Develop an Implementation work plan

•	Develop a communications and stakeholder management strategy and implementation plan
•	Conduct IM/IT planning and implementation (Toolbox,EMR)
•	Create an operating plan and budget

4. Scope

Scope is a critical element of a project as it describes the project boundaries in terms of its activities and the work to be performed and sets the stage for managing stakeholder expectations.

To meet each objective, identify the scope (the high-level work that is to be completed, including the tangible products that may be produced as a result of the work, if known). Scoping a project includes explicitly stating what this project will not do, (i.e. what is out of scope), particularly if it helps the reviewers further understand the project. Include appropriate rationale, for out of scope work, where possible. Scope is a key input to defining the work in a Work Breakdown Structure (WBS) which ultimately forms the basis for the project schedule (see the WBS How-To on the Strategic Planning & Transformation Support section of the portal for more information about the WB). As the project is planned further, the scope should be verified and iteratively revised with sponsor approval.

Within Scope
- Partnership Development
- Capital Development
- Functional Programming
- Service Planning
- Schematic Design
- Construction
- Youth and Family Engagement
- Close-out

Out of Scope
- Searching for additional funding outside of the Foundry process
- Non-Foundry services
- City Services using Foundry space

5. Key Milestones and Deliverables

| Leadership Engagement Lead gency/ Partners/ FCO | Foundry Orientation | Project Kick-Off Contracts Signed | Communications Planning | Fundraising Planning | Captial Build | Operations / Clinical Planning | Youth & Family Engagement Strategy | Project Close |
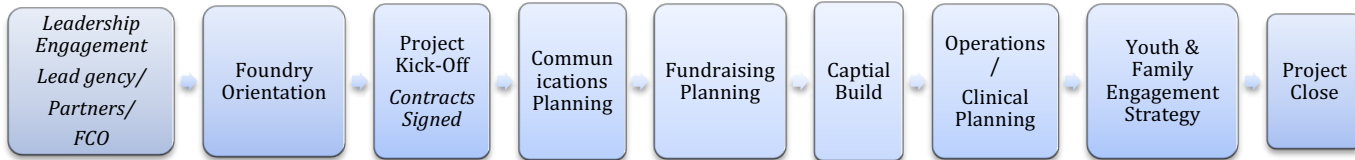
A milestone is a marker in a plan that represents a significant event in a project such as eh completion of a critical activity, a decision point, or the creation of a significant deliverable,

A deliverable is a measurable tangible verifiable outcome result or item that must be produced to complete a project or a portion of a project.

Project Phase	Milestone/Deliverable	Completion Date
Initiation/ Planning Phase	Establish partnerships/Leadership/Governance project structure and foundation.	
	Presentation/orientation event	
	Contracts signed (MOU, Capital, ISA)	
	Complete project charter and workplan	
	Develop communications plan	
	Develop fundraising plan	
	Complete functional programming	
	Develop Operational and Services plan	
	Develop youth & family engagement plan	
Implementation Phase	Complete recruitment of staff	
	Complete physician contracts and recruitment	
	Complete furniture procurement and installation	
	Supplies purchased, received and stocked	
	Open doors for services	
Stabilization Phase	Project stabilization and Hand Off to Operations	

6. Link Projects and Dependencies

	Linked Project	Possible Impact (TIME COST SCOPE QUALITY, OTHER)	Project Manager Name/Contact Info
1.			
2.			
3.			

7. Budget (high-level)

Item	Budget Estimate	Notes

8.   Project Risks

Risk	Probability (Low, Med, High)	Impact (Low, Med, High)	Mitigation	Responsible
An uncertain event or condition that, if it occurs, has an effect on at least one project objective	*What is the likelihood of this risk occurring?*	*If the risk occurs, how much of an impact will it have on the project?*	*Indicate what the team will do to prevent the risk from happening in the first place.*	

9. Project Resources & Structure

9.1 Project Team

Stakeholder	Name	Role
Foundry Centre		
Executive Director		
Project Manager		
Clinical Lead		
Foundry Central Office Team		Executive Director/FCO Sponsor
		Director Operations and Philanthropy/FCO Sponsor
		Director of Services and Innovation
		Director, Government and Indigenous Relations
		Director, Evaluation & Quality Improvement
		Project/Change Management Lead
		Implementation Manager
		Project Manager, Capital Projects
		Development & Philanthropy Lead
		Communications and Engagement Lead
		Communications Coordinator

		Youth Peer Engagement Coordinator
		Provincial Youth Peer Engagement Coordinator
		Family Engagement and Peer Support

9.2 Governance Model

Committee	Purpose of Committee	Membership
Steering Committee	• ***Funders Table (FT)*** *Function: advisory, advocacy within own organizations. Supports Lead Operator - navigating complex systems, removing barriers identified by LAC, YAC/PAC and/or SWG, allocating resources. Critical in early stages, may meet less frequently or merge with LAC over time. Led/Chaired by Lead Operator Executive Director.*	*Small group of decision-makers from core funding or resource-providing partners:* • *Regional Health Authority* • *MCFD* • *First Nation(s) or Indigenous organization(s)* • *School Districts* • *FCO* • *Executive Lead Agency*
Advisory Committee	• ***Leadership Advisory Council or Table (LAC/LAT)*** *–Function: community leadership, advisory, engagement. Advises Foundry Lead Operator on services and community/ partnership priorities. Led/Chaired by Lead Operator Executive Director, with support from Program/ Centre Lead.*	*Broad representation from community partners incl. local First Nation(s) and/or Indigenous organizations, with at least two youth and one family representatives*
Operations Working Committee	• ***Service Planning/ Operations Working Group (SWG)*** *–Function: operational integration (different from case review). Supports ongoing communication about service delivery within the centre, identifies and responds to drivers and barriers to integration (e.g. referral processes). Responds to recommendations of advisory groups; elevates issues for*	*Clinical and service management staff, including partners, operating within the centre.*

	discussion as needed. Led/ Chaired by Program/Centre Lead.	
Youth and Family/Parent Advisory Committee(s) YAC, F/PAC)	• **Youth and Family/Parent Advisory Committee(s) (YAC, F/PAC)** *–Function: leadership, advisory, engagement. Amplifies client voices to ensure they are at the centre of planning, service delivery, hiring, and centre priorities, provides youth with leadership opportunities. Supported by Foundry Centre staff, led/chaired as determined by youth and families.*	*Young people and family members. May be separate or combined.*

9.3 Key Responsibilities

Executive Sponsor Foundry Centre/ FCO sponsor	• Ensure project aligns with Foundry vision and goals • Champion Foundry vision to key stakeholders • Act as escalation point for issues beyond the control of the Foundry Centre project team • Ensure risks are managed appropriately and make go/no-go decisions
Foundry Centre Project Manager	• Controls the day to day aspects of the project. • Executes the Project Plan utilizing project management processes. • Facilitates development of Project Charter, Project Plan and Budget. • Assists with the development of the QI, Change, and Communications plan. • Works with the Initiative Director in executing the Project Plan. • Ensures project planning and project controls are carried out. • Organize initiative into manageable pieces.

	• Provides support to team members and team leaders. • Helps team leaders resolve issues and changes. • Tracks and disposes of issues. • Escalates to the Sponsor issues and changes that are outside the PM's authority (e.g. scope change requiring additional capital expenditures). • Monitor and report project progress. • Submits regular Status Reports to Project Sponsors. • Prepare meeting agendas and minutes. • Documents all findings and recommendations. • Facilitates meetings and discussions.
FCO Project Lead	• Call and chair project team meetings (Joint FCO & Centre PM meetings only). • Supports and controls the high-level aspects of the project. • Facilitates development of Project Charter, Project Plan and Budget. • Works with the Executive Directors in executing the Project Plan. • Organize initiative into manageable pieces. • Provides support to team members and team leaders. • Helps team leaders resolve issues and changes. • Tracks and disposes of issues. • Escalates to the Sponsor issues and changes that are outside the PM's authority. • Monitor and report project progress.
Project Team	• Carry out all phases and tasks of the project. • Provide, prepare and consolidate relevant documentation. • Ensure project deadlines are met. • Provide updates to staff through departmental meetings and/or documentation (e.g. minutes). • Produce and ensure quality of all deliverables. • Recommend go/no go decisions. • Reports to Initiative Director or Project Manager as appropriate. • Communicate regularly with Initiative Director and Project Manager.

10. Project Organizational Chart (optional)

Insert schematic representing organizational structure of the project.

Workplan - Guidance

Context – When to use

Once project deliverables and outcomes of an initiative have been clearly defined in the Project Charter, and required supports have been identified, a workplan should be developed.

Purpose – Why to use

A workplan:

- Identifies milestones and corresponding actions/tasks to achieve them.
- Confirms key project supports.
- Assigns responsibilities to individuals and/or groups.
- Allows the monitoring of progress, and status and holds individuals accountable.
- Ensures that critical timelines are being met and assigned tasks are being completed.
- Can influence or become the agenda for the core project team meetings.

Guidance for use – How to use

Note: The level of detail and use of a particular tool will depend on the complexity of the project and the need to adhere to tight timelines.

- The workplan is developed through consultation with the project team and/or key supports.
- Determine key milestones and the logical critical path. Milestones are generally articulated as completed (i.e. Project Budget Developed).
- Corresponding key tasks/activities to meet the milestones should be action oriented (i.e. develop, implement, approval, identify, present, validate, engage, report, etc).
- The workplan key tasks should include enough detail that someone new to the project would understand the activity required.
- Negotiate agreement of assigned responsibility and action completion dates.
- Where possible, the person assigned to a particular key task/activity will be a member of the project team, and will be expected to report back as per the teams agreed expectations.
- Where possible, avoid having more than one person responsible for a key task/activity.
- Update Status and Progress columns as required for project monitoring. The workplan should be updated regularly as per the needs of the core project team.
- Identify task related obstacles, risks, constraints or important details in the "Issue/Comments" column.

FOUNDRY Workplan - Master Plan On-boarding and Operations

Topic	Task	Status	Start Date	End Date	Assigned to	Support	Budget Notes	Comments
Project Management								
	Complete project charter/business case							
	Establish project team / resources and PM/CM approach							
	Complete workplan (PM/CM)							
	Communicate charter/workplan to internal FCO and External Centre project team							
Initiation								
	FCO and site leadership call - site award notification							
	Orientation							
	#1 orientation session with FCO, Lead Agency and Key Partners							
	#2 Kick-off meeting with partners #2 Orientation							
	#3 Orientation Community cont'd as appropriate							
	Establish funders table							
	Establish leadership table							
	Establish Operations Working Group							
	Establish youth advisory group							
	Establish family advisory group							
	Establish TOR for all working groups							
	Contract execution (LOI, Capital Contract, ISA, HA service contract, MOU, etc.,)							
Partnership Engagement								
	ID & develop partnership engagement and analysis							
	ID & develop youth engagement strategy							
	ID champion (leadership capacity to lead youth engagement)							
	ID & develop family engagement strategy							
	ID champion (leadership capacity to lead family peer support & family engagement)							
Change Leadership								
	Develop Foundry Centre specific story to coincide with the Foundry story (Vision & Awareness & Desire)							
	Orientation - Change Leadership - Sponsor - what it means to be an active/visible sponsor							
Capital Project								
	Perform commercial real-estate scan							
	Identify physical location							

Category	Task
	Review foundry space planning guide
	Develop functional program - capital
	Perform post occupancy evaluation
Communications	Orientation to the brand (branding process, DNA, etc.)
	Develop communications plan
	Develop announcement plan and event strategy with LA and Ministry
Budgets/Contracts	**Budget/Contracts**
	Capital budget
	Contract execution (LOI, Capital Contract, ISA, HA service contract, MOU, etc.,)
Fundraising	**Fundraising**
	ID fundraising partners and develop plan
	Fundraising capacity assessment
	Confirm philanthropic dollars
	Close out fundraising campaign, announce results
	Support LA to finalize donor wall, as needed
Center Operations Governance Development	
	Centre Service Support Scan
	ID which services Lead Agency
	ID services available in the community that support Foundry model
	Solicit in-kind resources to support delivery of services at Foundry Centre
	Develop strategic partnership to compliment existing agency services and fill gaps
	MOU (renew)
	Educate partners on the Foundry Service Model including ISCM as the core framework of service partnership development
	Foundry Support Planning
	Determine if partners can contribute to:
Operational Partnership Development	Software lease costs
	Lease costs & shared services
	Shared administrative staff
Tool - Service scan	Orientation to KE for Operations managers and training plan (high level)
	Foundry, JSCM and walk-in services
	Develop infrastructure for WIC
	Develop infrastructure for ISCM
	Create an organizational chart and identify reporting structure
	Policy and procedure development
	Review existing policies and procedures
	Establish shared agreements on for service delivery commitments
	IT requirements

Operations Planning	Assess partner functional requirements to operate on site
	Partner commitment to use Toolbox
	Ensure Toolbox IT requirements accommodated
	Communication
	Team meetings
	Internal Referrals
	External Referrals
	Orientation plan for frontline team members
	Staffing infrastructure/model development
	Physician Contracts in place
Service Planning	**Client care planning**
	Service pathways and workflow development
	Most Responsible Care Provider
	Collaborative Care planning Rounds
	Clinical protocols in place (crisis intervention)
	Supervision model
	Model of Care document completed
	Standards orientation and implementation
	Youth Peer Support
	Family Peer Support
	Walk in Counselling
	Standards for ISCM Pathways
	Mood, anxiety, distress
	Substance use
	Psychosis
	Disorder eating
	Service pathways and workflow - Mental Health
	Screening/ Assessment
	Walk In counseling
	Individual Therapy
	Groups
	Family support
	Outreach
	Psychiatry
	Service pathways and workflow - Substance Use
	Screening/ Assessment
	individual Therapy
	Harm Reduction
	Groups
	Family Support
	Service pathways and workflow - Primary Care
	Transcare
	Physical Health
	Sexual Health
	Addictions Medicine (OAT)
	Shared Care
	Service pathways and workflow - Peer Support
	Service pathways and workflow - Social Services
	Housing
	Vocation

	STADD
	Income assistance
	Cultural Services
	Training
	Toolbox
	EFFT
	SFBT walk-in counselling
	Youth Peer Support
	Family Peer Support
	Cultural Safety (for all)
	Family Support (for all)
Team Development	Integration with intention
	Develop a team agreement that supports a culture of integration
	Schedule annual team retreat
Sustainment and evaluation plan	Orientation to evaluation/performance measurement strategy (including Toolbox)
	Toolbox implementation
	Survey administration (youth, family/caregiver, staff, partners)
	Tracking turnaways & Waittimes
	Follow-up to address issues (data quality follow up)
	Data feedback (at least monthly) and analysis
	Making requests for site specific data
Special Project	Virtual Care
	ISCM
	PCN
	School District
	Diversity working group led by FCO
	Mobile
	Wellness Project

Leadership and Governance

Change Management Framework for Foundry Centres

INTRODUCTION TO PROSCI ADKAR® MODEL

This document provides a basic framework that can be followed to support initiatives resulting in change by highlighting the use of the Prosci ADKAR® Model.

Good change management practices ensure that the "people side" of change — in addition to the operational side — is considered and addressed within project management and leadership activities.

Change is often a complex and difficult process. Leading successful change in other people and across organizations requires new thinking and new tools. The ADKAR Model is a valuable framework for leaders and managers to effectively lead a wide variety of changes. The lens of ADKAR reveals both key concepts that influence successful change and actionable insights for implementing these concepts.

ADKAR is an acronym that represents the five milestones or outcomes an individual must achieve for change to be successfully realized: **awareness, desire, knowledge, ability and reinforcement**. When applied to organizational change, this model allows leaders and teams to focus their activities on what will drive individual change and produce organizational results collectively.

The goals or outcomes defined by ADKAR are sequential and cumulative. They must be achieved in order. For a change to be implemented and sustained, an individual must progress through each of the milestones, starting with awareness. (© Prosci Inc)

Individual Change

Understanding the phases of transition that people experience — and the accompanying resistance — helps leaders to address the people side of change. To support people through this process, leaders should use the ADKAR model, which asks them to apply tailored activities to facilitate people's transition towards commitment to the change.

Awareness of the need for change
Desire to participate and support the change
Knowledge on how to change
Ability to implement required skills and behaviours
Reinforcement to sustain the change

In the absence of:	You will see:
Awareness and **Desire**	• More **resistance** from staff • Staff asking the same questions **over and over** • Lower **productivity** • Higher staff **turnover** • Hoarding of **resources** and **information** • **Delays** in implementation
Knowledge and **Ability**	• Lower utilization or incorrect usage of new processes, systems and tools • Staff worry if they are prepared to be successful in future state • Greater impact on clients and partners • Sustained reduction in productivity
Reinforcement	• Staff will revert back to old ways of doing work • Ultimate utilization is less than anticipated • The organization creates a history of poorly managed change

Resistance to Change

Resistance is a natural response to change, and recognizing and managing resistance is a key skill for the effective change leader or manager.

Resistance is a healthy part of any change process. Manage it effectively, and it can strengthen your change initiative. Ignore it, and it can quietly undermine all your great intentions.

Questions for leaders and managers to ask in assessing resistance:

- Why do you think the change is happening? (Awareness)
- Do you support this change? What is influencing that choice? (Desire)
- Do you have training you need? (Knowledge)
- Are you having any difficulty implementing this training? If yes, what area? (Ability)
- Are you getting the support you need? (Reinforcement)

Action steps for managing resistance:

- Listen and understand objections (turn judgment into curiosity)
- Focus on the "what" and let go of the "how"
- Remove barriers to A, D, K, A and R
- Provide simple, clear choices and consequences
- Create hope: what the vision of improved client care will look like
- Show benefits from the change in a tangible way
- Make a personal appeal for support.
- Convert the strongest dissenters — listen to them, act on their requests if possible, and show empathy

Sponsors and Leadership

Executives and senior leaders play an essential role in times of change. An organization looks to its leaders to be visible sponsors of change and to demonstrate why change is necessary. Senior leaders provide the authority and credibility necessary for successful change.

The Primary Sponsor is the person who charters and authorizes the change. For large changes, this person is typically a Senior Executive, Senior Leader or Office Manager. For smaller changes, this person could be a Supervisor or Lead Clinician.

The primary sponsor has two qualities:
Authority to authorize the change
Resources to enable and support the change

Role of the Sponsor:

- Active, visible sponsorship for the change:
    - Advocate consistently through usual channels
    - Clarify expectations for success
    - Determine accountabilities and communicate them
    - Remove barriers
    - Influence — acknowledge successes and early wins
- Build a coalition of change leaders and champions:
    - Enable them to advocate for the change, coach and train employees, look for signs of passive or active resistance and manage it, and spend time listening and answering questions
- Communicate directly with staff:
    - Be present and visible, speak honestly about the change, bring forward a positive vision for the future, and acknowledge staff's contributions

TEMPLATE:

PROJECT NAME CHANGE MANAGEMENT PLAN:

Last updated: XXX

Reasons for Utilizing Change Management Practices on a Project:

- Change management — with its focus on increasing Awareness, Desire, Knowledge, Ability and Reinforcement (ADKAR) for impacted staff, managers and leaders — is proven to lead to increased successful project outcomes during times of change and transition.

- A change management approach decreases uncertainties that may exist for staff that could negatively affect job proficiency, speed of adoption of new processes, use of resources, potential for benefits realization and staff morale and absenteeism.

- Areas of active or passive resistance must be identified and monitored so they can be managed through communications channels, training and coaching. When staff and leaders have a level of comfort in and understanding of change, evidence indicates a reduced rate of overall project risk, less chance of non-compliance, faster adoption and enhanced ability to optimize new processes.

Objective and Measures for Success:

Before you can identify objectives and measure for success, you must have a clear understanding of what is changing.

The primary objective of the Change Management Plan for a project needs to be identified. Some examples can be based on individual staff assessment metrics, such as adoption, usage, compliance, proficiency and the like.

Example: Counsellors to see 18 walk-in clients a week within three months of opening.

Example: Groups are offered at step 2 and step 3 levels within six months of opening.

Change Management Plan

Potential Change Management Activities:

Phase	Activities	Deliverables	Responsibilities	Time Frame

Planning	1. Identify Sponsor, change agents and roles and responsibilities
	2. Prepare a draft change plan:
	  • Engage key stakeholders/staff
	  • Assess the change
	    ○ Define what is changing?
	    ○ What are the knowledge gaps?
	    ○ Define the impact of the change for all stakeholders
	  • Identify who needs to change; assess change readiness
	  • Identify areas of potential resistance and areas of support for the change
	3. Clarify Leaders/sponsors expectations for change and ensure conditions for success for managers/staff. For example:
	  • Assess workload and timing
	  • Assess resource requirements (training, communications, time for training, ability and capacity to coach staff)
	  • Is timing for this change feasible and realistic?
	  • Are we creating conditions for success?
	  • Review and adjust this plan to increase feasibility and enhance likelihood of success.
	4. Create timeline
		• Stakeholder assessment
		• Change Activities list
		• Change timeline
			Leadership/Sponsors
			Project Managers	

	5. Obtain resources to successfully roll out plan, such as trainer, super user, change champion	• Change team and supports • Change Mangement Activities, Timeline		

Change Management Plan

		Develop:
Awareness	Develop awareness among staff of the need for change. Develop scripted messaging about the project to deliver face-to-face in team meetings: • Why this, why now, why it's important • What happens if we don't do this? What is the risk? • How does this fit into the whole system? How does it bring value to clients, to Foundry? • What's in it for me (WIIFM)? — aimed at staff, leads, managers • How leaders, managers will be enabled to make this change and complete the necessary activities (attend training, act as a super user/mentor) within the timeline	• Communications Plan • Scripts and messaging • Stories • FAQ sheet for staff with examples of WIIFM • Timeline sheet for managers, including clear messaging on accountabilities, responsibilities
Desire	Determine the motivating factors behind the change(s) such as improved client care; standardization; increased engagement through team culture Determine WIIFM for all team members Determine potential challenges to creating Desire such as staffing changes; change in processes; historical negative experience of change; Develop a plan to mitigate challenges	• Defined roles and responsibilities and accountabilities (staff, managers) • 1:1 coaching meetings with staff as needed • A forum for Q&A (anonymous box, meetings)
Knowledge	Train staff on new processes and tools Provide clear messaging about responsibilities and accountabilities	• Develop training plan and timelines
Ability	Remove any barriers for using new tools and processes Ensure there are regular 'temperature checks': opportunities for managers and staff to provide feedback, offer peer coaching, ask questions, acknowledge wins.	• Meetings for staff to provide feedback • 1:1 coaching

Reinforcement	Develop and use tools and methods to measure compliance	• Celebration event(s)	
	Ensure there is follow up and consequences for those not complying	• Personal recognition	
	Accountability and 'checks and balances'		
	Celebrate compliance, early wins		
	Lessons Learned debrief		

Funders Council - FOUNDRY
TERMS OF REFERENCE: FUNDERS COUNCIL – FOUNDRY

1. **Background**

FOUNDRY's provincial vision is to transform how youth people access health and social services within British Columbia. As part of this, we work with partners and communities to open FOUNDRY centres – making services available to young people, aged 12-24 in appropriate environments.

FOUNDRY aims to increase access to services by fostering cross-system and inter-sectoral integration of the range of supports young people and their families need to thrive in their communities. FOUNDRY centres practice and promote new ways of working with youth, young adults and caregivers that make it easier to access the right care at the right time.

For FOUNDRY to be successful, it is critical that our many partners share and champion our provincial vision. And, we ask our Lead Agencies to develop local visions for their FOUNDRY Centres together with their communities, partners, youth and families.

2. **Purpose**

The purpose of the Funders Council for the FOUNDRY   Centre is to provide the overarching governance and oversight for FOUNDRY   . Included in this role is to ensure that high level communications and contracts to the Core Operating Partners of FOUNDRY   are in line with outcomes and objectives for FOUNDRY   . Decision making will assist in meeting service delivery objectives and expectations, and to maintain strong engagement with the community and local stakeholders, in relation to Richmond Addiction Services Society's role as a Lead Agency of FOUNDRY   and operator of the FOUNDRY   .

A critical role for this council is to elevate issues from a community level in   to a regional or even a provincial level when appropriate.

Project continuity is a significant outcome for this table to ensure succession planning and guarantee the longevity of FOUNDRY   regardless of internal changes that occur in local agencies and governments.

3. **Membership**

Membership in the Funders Council – FOUNDRY   is listed in Appendix A to these Terms of Reference and consists of:

3.1. The senior staff person of the Lead Agency will have direct operational accountability for FOUNDRY.

3.2. One representative from each of the following organizations will fully commit to meaningful engagement by each organization as a constructive contributor towards the FOUNDRY _____ Center's vision. Individuals will be appointed with seniority in accordance with the level appropriate to the decision-making function of their organization, from:

    3.2.1. Vancouver Coastal Health Authority – Director of Mental Health and Substance Use

    3.2.2. The BC Ministry of Child and Family Development – _____ (Executive Director of Service _____ / Vancouver)

    3.2.3. The BC Ministry of Child and Family Development – _____ (Director of Operations, MCFD; _____ / Vancouver CYSN; Regional Director, ECD)

    3.2.4. _____ School District (SD#38) - Director of Instruction – Learning Services

    3.2.5. _____ Addiction Services Society – Executive Director

    3.2.6. A representative of the FOUNDRY Central Office. The representative is to provide a mechanism to support developmental evaluation and knowledge exchange, and allow for strong communication between the FOUNDRY Central Office and FOUNDRY _____ and support potential Leadership challenges in real-time.

4. Leadership

4.1. The Chair of the Funders Council – FOUNDRY _____ will be Executive Director of _____ Addiction Services Society as part of its role as a Lead Agency of the FOUNDRY _____

5. Mandate and Duties

5.1. The Funders Council – FOUNDRY _____ is convened by and reports to the Lead Agency.

5.2. The Funders Council – FOUNDRY _____ has the authority to:

    5.2.1. Review and evaluate the effectiveness of its own activities;

    5.2.2. Ensure adherence to, abide by and uphold all relevant Lead Agency policies and procedures;

    5.2.3. Consider and make recommendations on any issues referred to the Funders Council – FOUNDRY _____ by the Lead Agency and Funders Council;

    5.2.4. Establish such working groups or task forces as it deems relevant to accomplish its responsibilities; create and approve Terms of Reference for such bodies; direct their tasks; and receive the reports and recommendations from them.

5.3. The Funders Council – FOUNDRY _____ has the responsibility to:

    5.3.1. Advise on the development, monitoring and review of the objectives of the FOUNDRY _____

5.3.2.   Advise the Lead Agency on future directions in respect of the FOUNDRY ▓▓▓▓▓▓ ;

5.3.3.   Advise and assist in defining opportunities, identifying partners and developing collaborative links for the FOUNDRY ▓▓▓▓▓ ;

5.3.4.   Promote the interests of the FOUNDRY ▓▓▓▓▓ ;

5.3.5.   Disseminate authorized information regarding the strategies, decisions and achievements of the FOUNDRY ▓▓▓▓▓ Centre through developed communication channels;

5.3.6.   Facilitate effective communication processes between and amongst its members;

5.3.7.   Provide input to the ▓▓▓▓▓ annual plan, and make recommendations to support the effectiveness of the FOUNDRY ▓▓▓▓▓ .

5.3.8.   Monitor the ▓▓▓▓▓ work plan and key performance indicators as agreed by the LAC-▓▓▓▓▓ .

6.   Voting and Decision-Making

6.1.   The Funders Council – FOUNDRY ▓▓▓▓▓ shall aim to operate by consensus.

6.2.   Members are responsible for raising issues of concern prior to committing to final decisions.

6.3.   If consensus is not possible, a majority decision shall be reached with the majority consisting of votes from the number of representatives eligible to vote.

6.4.   In the event of disagreement or divergence of views, members will at all times make best efforts conduct themselves in a manner consistent with their Role Description, and in particular to be guided by the FOUNDRY principles laid out therein.

6.5.   Decisions made at the Funders Council – FOUNDRY ▓▓▓▓▓ meetings will be final, based on the assumption that all members have sufficient notification to ensure representation at the meeting and the opportunity to raise issues of concern to enable them to be addressed.

6.6.   All decisions endorsed by a meeting of the Funders Council – FOUNDRY ▓▓▓▓▓ for which five days' notice has been given will be considered a final decision

7.   Operations and Documentation

7.1.   The Funders Council – FOUNDRY ▓▓▓▓▓ will meet monthly during the preparation stage of the development of FOUNDRY ▓▓▓▓▓ , and at the call of the Chair.

7.2.   A minimum of fourteen working days' notice shall be provided as part of the call for convening of any meeting

7.3.   For any Funders Council – FOUNDRY ▓▓▓▓▓ meeting to proceed and be considered duly constituted, the Chair and a representative of the Lead Agency must be present (regardless of quorum).

7.4.   A quorum of 50% plus 1 is necessary for any decision made at Funders Council – FOUNDRY ▓▓▓▓▓ meetings. If no quorum is present within half an hour of the time

of the appointed meeting time, the meeting may continue on the basis that decisions will be ratified at the next duly constituted Funders Council – FOUNDRY _____ meeting. Any such decisions will not be considered binding until such ratification has occurred.

7.5. All members shall serve voluntarily, without remuneration.

7.6. All members will be reimbursed for travel expenses as incurred, at rates not to exceed those currently approved for public sector employees in British Columbia, upon submission of original invoices.

7.7. Delegates are permitted.

7.8. Guests may be invited to attend with prior notice and the agreement of the Chair

7.9. A majority of members (50% plus one) will constitute quorum for Funders Council – FOUNDRY _____ meetings.

7.10. Administrative support for Funders Council – FOUNDRY _____ will be provided by the Lead Agency including recording of minutes.

7.11. With respect to minutes of Funders Council – FOUNDRY _____ meetings:

    7.11.1. Draft minutes for each meeting will be presented to members electronically within 30 days of the meeting, and brought forward to the next meeting for Funders Council – FOUNDRY _____ approval.

    7.11.2. Approved minutes will serve as the official record of Funders Council – FOUNDRY _____ deliberations.

8. Monitoring and Evaluation

The Funders Council – FOUNDRY _____ will conduct a self-evaluation at least once annually to determine the effectiveness in meeting its mandate and duties, as outlined in the Terms of Reference. The results of the self-evaluation will be discussed and any recommended changes will be enacted.

9. Document Control

Original approved per	_____ Addiction Services Board of Directors and FOUNDRY Central Office	December 17, 2018
RASS Board President		
FOUNDRY Central Office Executive Director		

Appendix A

Membership

Vancouver Coastal Health – (VCH – ⬜⬜⬜⬜⬜)

Ministry for Children and Family Development (MCFD – ⬜⬜⬜⬜⬜)

FOUNDRY Central Office (FCO)

⬜⬜⬜⬜⬜ Addiction Services Society (RASS)

⬜⬜⬜⬜⬜ School District (SD#38)

Leadership Advisory Committee – FOUNDRY ▮▮▮▮▮▮

TERMS OF REFERENCE: LEADERSHIP ADVISORY COMMITTEE – FOUNDRY ▮▮▮▮▮▮

1. **Background**

   FOUNDRY's provincial vision is to transform how youth people access health and social services within British Columbia. As part of this, we, committee members, work with partners and communities to open FOUNDRY centres – making services available and accessible to young people, aged 12-24.

   FOUNDRY aims to increase access to services by fostering cross-system and inter-sectoral integration of the range of supports young people and their families need to thrive in their communities. FOUNDRY centres practice and promote new ways of working with youth, young adults and caregivers that make it easier to access the right care at the right time.

   For FOUNDRY ▮▮▮▮▮▮ to be successful, it is critical that FOUNDRY ▮▮▮▮▮▮ partners share and champion the provincial vision as well as develop local visions for their FOUNDRY Centres together with their communities, partners, youth and families.

2. **This committee member's table reports to the FUNDERS Council;** FOUNDRY Central Office; ▮▮▮▮▮▮ Addiction Services Society (Lead Agency); Vancouver Coastal Health Mental Health and Addictions; Ministry for Children and Family Development – ▮▮▮▮▮▮ & the ▮▮▮▮▮▮ School District

3. **Purpose**

   The purpose of the Leadership Advisory Committee for the FOUNDRY ▮▮▮▮▮▮ Centre (LAC – FOUNDRY ▮▮▮▮▮▮) is to support operational leadership, provide advice and work in partnership with the FUNDERS Council, Lead Agency and Program Manager of FOUNDRY ▮▮▮▮▮▮. This advice and support is to enable FOUNDRY ▮▮▮▮▮▮ to meet service delivery objectives and expectations, and maintain strong engagement with the community and local stakeholders, in relation to ▮▮▮▮▮▮ Addiction Services Society's role as the Lead Agency of FOUNDRY ▮▮▮▮▮▮ and operator of the FOUNDRY ▮▮▮▮▮▮.

4. **Membership**

   Membership in the LAC - FOUNDRY ▮▮▮▮▮▮ is listed in Appendix A to these Terms of Reference and consists of:

   4.1. The senior staff person of the Lead Agency will have direct operational accountability for FOUNDRY.

4.2. One representative from each of the following organizations will fully commit to meaningful engagement by each organization as a constructive contributor towards the FOUNDRY Center's vision. Individuals will be appointed with seniority in accordance with the level appropriate to the decision-making function of their organization, from:

4.2.1.
4.2.2.
4.2.3.
4.2.4.
4.2.5.
4.2.6.
4.2.7.
4.2.8.
4.2.9.
4.2.10.
4.2.11.
4.2.12.
4.2.13.
4.2.14.
4.2.15.
4.2.16.
4.2.17.
4.2.18.
4.2.19.
4.2.20.
4.2.21.
4.2.22.
4.2.23. At least two individuals with lived experience as a youth with mental health and/or substance use concerns.
4.2.24. At least one individual with lived experience as the parent/guardian of adolescent(s) with mental health and/or substance use concerns.
4.2.25. A representative of the FOUNDRY Backbone Organization as ex-officio. The purpose of the Backbone representative is to provide a mechanism to support Developmental Evaluation and knowledge exchange, and allow for strong communication between the FOUNDRY Central Office and FOUNDRY   and support potential Leadership challenges in real-time.

4.3. Such other individuals as are appointed from time to time by mutual agreement of the Chair and Vice-Chair.

4.4. As a condition of appointment to the LAC-   , nominees for membership shall review and acknowledge their agreement to abide by the LAC - FOUNDRY   See Member Role Description in Appendix A.

4.5. Members of this committee are leaders from the Partnering Agencies. Other members of the partnering agencies may be included to inform Strategic directions

4.6. Action Groups made up of members or additional members will be created from time to time

4.7. Committee members are responsible to engage their respective organizations by providing updates/communication and ensuring committee representation at FOUNDRY-⬜⬜⬜.

5. Leadership

5.1. The Co-Chair of the LAC - FOUNDRY ⬜⬜⬜ shall be nominated in collaboration with the Executive Director of ⬜⬜⬜ Addiction Services Society as part of their role as a Lead Agency of the FOUNDRY ⬜⬜⬜ and operator of the FOUNDRY ⬜⬜⬜ Centre and Co-Chair of the LAC.

5.2. The Co-Chair of the LAC - FOUNDRY ⬜⬜⬜ shall be voted on by the members of the LAC - FOUNDRY ⬜⬜⬜ from amongst the members.

5.3. The term of office of the partnering Co-Chair shall be one year, renewable, with a maximum of three concurrent terms.

    5.3.1. After three years of service, an individual serving as the partnering Co-Chair shall not be eligible for re-appointment to that role until a minimum of one year has elapsed.

6. Mandate and Duties

6.1. Partnering agency members are accountable to their home agency and Board of Directors but agree to fully participate in the operations of the LAC – FOUNDRY ⬜⬜⬜ which means that LAC members are committed to the outcomes set forth by FOUNDRY ⬜⬜⬜

6.2. Members who are not associated with a home agency are accountable to the LAC - FOUNDRY ⬜⬜⬜ and will work to achieve the outcomes set by FOUNDRY ⬜⬜⬜

6.3. The LAC - FOUNDRY ⬜⬜⬜ is convened by and reports to the Lead Agency.

6.4. The LAC - FOUNDRY ⬜⬜⬜ has the authority to:

    6.4.1. Review and evaluate the effectiveness of its own activities;

    6.4.2. Ensure adherence to, abide by and uphold all relevant Lead Agency policies and procedures;

    6.4.3. Consider and make recommendations on any issues referred to the LAC - FOUNDRY ⬜⬜⬜ by the Lead Agency, Funders Council and Program Manager of the FOUNDRY ⬜⬜⬜;

    6.4.4. Establish such working groups or task forces as it deems relevant to accomplish its responsibilities; create and approve Terms of Reference for such bodies; direct their tasks; and receive the reports and recommendations from them.

6.5. The LAC - FOUNDRY ⬜⬜⬜ has the responsibility to:

    6.5.1. Advise on the development, monitoring and review of the objectives of the FOUNDRY ⬜⬜⬜

    6.5.2. Advise the Lead Agency on future directions in respect of the FOUNDRY ⬜⬜⬜;

    6.5.3. Advise and assist in defining opportunities, identifying partners and developing collaborative links for the FOUNDRY ⬜⬜⬜;

    6.5.4. Promote the interests of the FOUNDRY ⬜⬜⬜;

6.5.5. Disseminate authorized information regarding the strategies, decisions and achievements of the FOUNDRY _____ Centre through developed communication channels;

6.5.6. Facilitate effective communication processes between and amongst its members;

6.5.7. Provide input to the _____ annual plan, and make recommendations to support the effectiveness of the FOUNDRY _____ .

6.5.8. Monitor the _____ work plan and key performance indicators as agreed by the LAC-FOUNDRY _____ .

7. Voting and Decision-Making

7.1. The LAC - FOUNDRY _____ shall aim to operate by consensus.

7.2. Members are responsible for raising issues of concern prior to committing to final decisions.

7.3. If consensus is not possible, a majority decision shall be reached with the majority consisting of votes from the number of representatives eligible to vote.

7.4. In the event of disagreement or divergence of views, members will at all times make best efforts conduct themselves in a manner consistent with their Role Description, and in particular to be guided by the FOUNDRY principles laid out therein.

7.5. Decisions made at the LAC - FOUNDRY _____ meetings will be final, based on the assumption that all members have sufficient notification to ensure representation at the meeting and the opportunity to raise issues of concern to enable them to be addressed.

7.6. All decisions endorsed by a meeting of the LAC - FOUNDRY _____ for which five days' notice has been given will be considered a final decision of the whole LAC-_____ .

8. Operations and Documentation

8.1. The LAC - FOUNDRY _____ will meet at least six times annually, and at the call of the Chair.

8.2. A minimum of five working days' notice shall be provided as part of the call for convening of any meeting of the LAC- FOUNDRY _____ .

8.3. For any LAC - FOUNDRY _____ meeting to proceed and be considered duly constituted, the Chair and a representative of the Lead Agency must be present (regardless of quorum).

8.4. A quorum of 50% plus 1 is necessary for any decision made at LAC - FOUNDRY _____ meetings. If no quorum is present within half an hour of the time of the appointed meeting time, the meeting may continue on the basis that decisions will be ratified at the next duly constituted LAC - FOUNDRY _____ meeting. Any such decisions will not be considered binding until such ratification has occurred.

8.5. All members shall serve voluntarily, without remuneration.

8.6. All members will be reimbursed for travel expenses as incurred, at rates not to exceed those currently approved for public sector employees in British Columbia, upon submission of original invoices.

8.7. Delegates are permitted.

8.8. The FOUNDRY _____ Manager *(or relevant position)* will attend LAC - FOUNDRY _____ meetings and report on the performance and operations of the centre according to a structure determined by the LAC-_____.

8.9. At its sole discretion, the LAC - FOUNDRY _____ may meet without the Centre Manager *(or relevant position)* being present.

8.10. Guests may be invited to attend with prior notice and the agreement of the Co-Chairs.

8.11. A majority of members (50% plus one) will constitute quorum for LAC - FOUNDRY _____ meetings.

8.12. Administrative support for LAC - FOUNDRY _____ will be provided by the Lead Agency including recording of minutes.

8.13. With respect to minutes of LAC - FOUNDRY _____ meetings:

    8.13.1. Draft minutes for each meeting will be presented to members electronically within 30 days of the meeting, and brought forward to the next meeting for LAC - FOUNDRY _____ approval.

    8.13.2. Approved minutes will serve as the official record of LAC - FOUNDRY _____ deliberations.

    8.13.3. Copies of meeting minutes will be circulated to the [Lead Agency's Executive Director] and following their approval by LAC- FOUNDRY _____.

9. Monitoring and Evaluation

The LAC - FOUNDRY _____ will conduct a self-evaluation at least once annually to determine the LAC – FOUNDRY _____ effectiveness in meeting its mandate and duties, as outlined in the Terms of Reference. The results of the self-evaluation will be presented to LAC - FOUNDRY _____ for discussion and development of recommendations to the Lead Agency.

10. Document Control

Original approved per	_____	Addiction Services Board of Directors and FOUNDRY Central Office	December 14, 2018
RASS Board President			
FCO – Executive Director			

Appendix A.

Chair:
Co-Chair: TBA

Members Role Descriptions:

Core Operating Partner – offering core services within FOUNDRY
Co-Location Partners – regularly using space within FOUNDRY   offering social services
Community Partners – supporting, referring, partnering but not utilizing space regularly at FOUNDRY
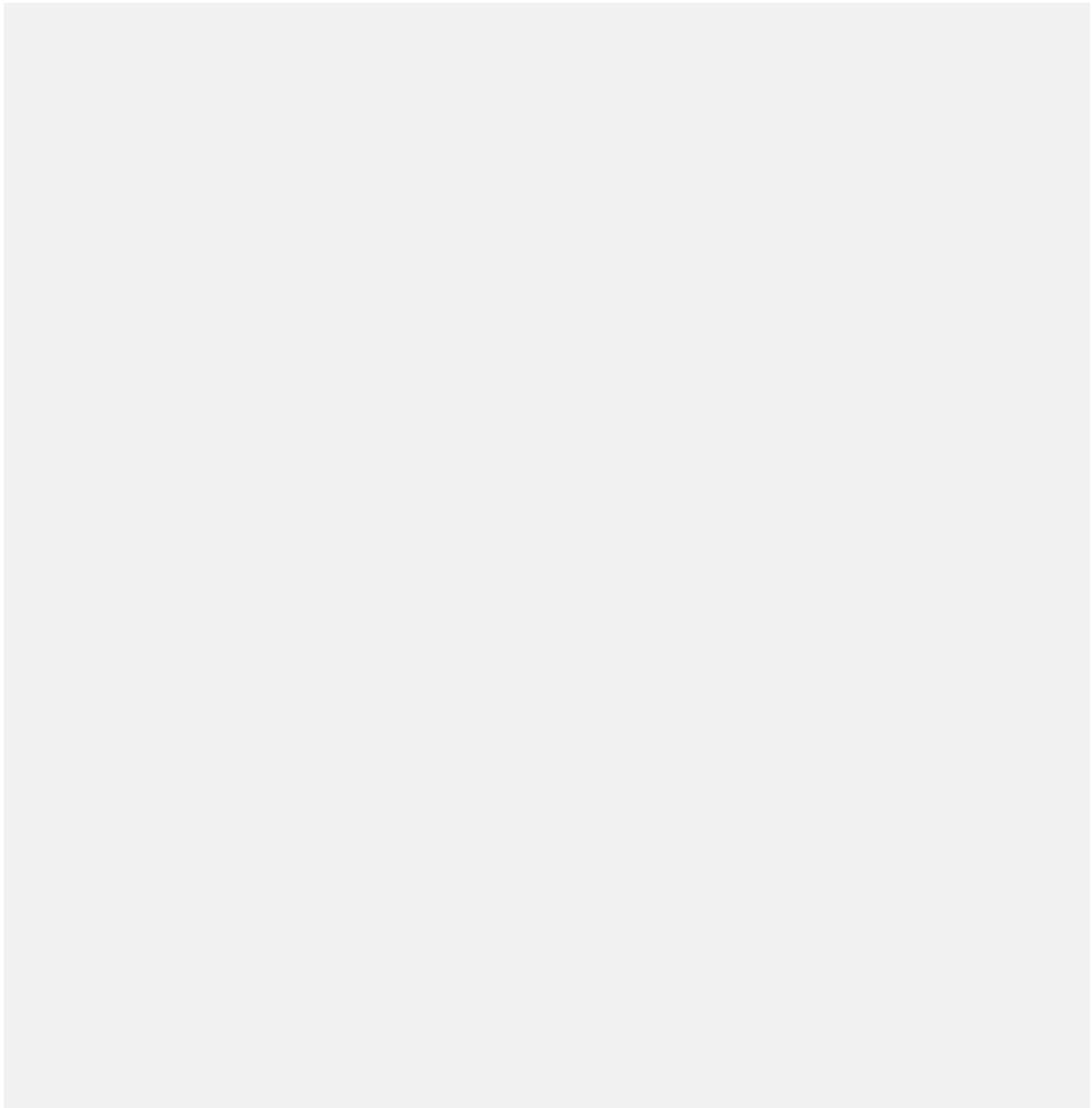
Membership

Foundry Prince George Service Delivery Working Group

Frequency: Bi-Weekly, Wednesdays from 9:00-10:00. First meeting March 21, 2017.

Location: Revolving amongst stakeholders, location in outlook will be up to date.

Purpose:

- Develop service delivery processes for young people accessing core services at Foundry.
- Define roles and functions of members of the Foundry Team in Foundry service delivery.
- Determine service delivery times, schedules of services.
- Develop plans for transition services for young people aged 19-24.
- Determine reporting structures of staff and needs/roles of clinical supervision.
- Identifying training needs for staff to delivery services at Foundry.
- Identify safety risks and policy requirements.
- Share information from service delivery working group with the Core Partners Group and Foundry central.
- Focus on service delivery at time of opening and identify future needs for planning and consideration.

Guiding Principles:

- A comprehensive system of care ensures that health promotion, prevention and early intervention are core components of our services.
- Services are timely, accessible, developmentally appropriate, socially inclusive and equitable, and culturally safe, congruent, and trauma-informed.
- Services are youth- and family-centered, collaborative, and empowering to both.
- Integration of services occurs through intentional partnerships and collaborative inter-sectorial working relationships, with special attention on the actual process of integration.
- All services are evidence-informed and effective.
- Services will pay particular attention to diversity and cultural safety

Foundry Youth Health Centres Core Services

1. Primary Care –i.e., physical health, sexual health
2. Mental Health Services
3. Substance Use Services
4. Social Services –i.e., vocational, educational, financial, housing/shelter
5. Youth and Family Peer Support and Navigation

Foundry SDWG
Meeting Minutes Te

Meeting Minutes:

Building healthy
communities

Foundry Central Family Ambassador Team

Terms of Reference

September 27, 2018 – March 28, 2019

·FOUNDRY·
WHERE WELLNESS TAKES SHAPE

Purpose To provide opportunities for integrating meaningful family engagement in shaping the development, implementation, operations and evaluation of Foundry Centres/Provincial Network. Our intention is to engage families as integral partners within the Network and to expand the provincial leadership role of members working directly with FCO, ensuring that the voice of families and caregivers informs all the work we do at Foundry.

Membership

Foundry Abbotsford.

Foundry Campbell River. TBD

Foundry Central Office.

Foundry Kelowna.

Foundry North Shore.

Foundry Penticton.

Foundry Prince George.

Foundry Richmond. TBD

Foundry Ridge Meadows.

Foundry Terrace. TBD

Foundry Vancouver-Granville. TBD

Foundry Victoria.
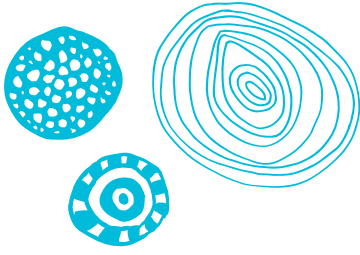
Partnerships and Community Development

C.1 Partnership Self-Assessment Tool

C.2 Template: Partnership Self-Assessment Report

PARTNERSHIP SELF-ASSESSMENT TOOL

Questionnaire

Instructions

This questionnaire asks questions about different aspects of your partnership. It will take about 15 minutes to complete.

The questionnaire allows you to express your opinions and provide information about your experiences anonymously. **DO NOT WRITE YOUR NAME ANYWHERE ON THE QUESTIONNAIRE** and your name will not be attached in any way to the responses you give.

By answering the questions, you will help your partnership learn about its strengths and weaknesses and about steps that your partnership can take in order to improve the collaboration process. The answers that people in your partnership give will be used to generate a report for your partnership. Only the people in your partnership will have access to this report.

There are no right or wrong answers to the questions. Thoughtful and honest responses will give your partnership the most valuable information. **Please answer every question, and please check only one answer per question.**

To complete the questionnaire:

- Please use a BLUE or BLACK ink pen.

- Be sure to read all the answer choices before marking your answer.

- Answer each question by placing a legible check mark or "X" in the box to the left of your answer, like this:

  [√] Extremely well   OR   [X] Extremely well

- Please return the completed questionnaire in a manner that protects your anonymity, as instructed by your coordinator.

Synergy

Please think about the people and organizations that are participants in your partnership.

a. <u>By working together</u>, how well are these partners able to identify new and creative ways to solve problems?

    [   ] Extremely well
    [   ] Very well
    [   ] Somewhat well
    [   ] Not so well
    [   ] Not well at all

b. <u>By working together</u>, how well are these partners able to include the views and priorities of the people affected by the partnership's work?

    [   ] Extremely well
    [   ] Very well
    [   ] Somewhat well
    [   ] Not so well
    [   ] Not well at all

c. <u>By working together</u>, how well are these partners able to develop goals that are widely understood and supported among partners?

    [   ] Extremely well
    [   ] Very well
    [   ] Somewhat well
    [   ] Not so well
    [   ] Not well at all

d. <u>By working together</u>, how well are these partners able to identify how different services and programs in the community relate to the problems the partnership is trying to address?

    [   ] Extremely well
    [   ] Very well
    [   ] Somewhat well
    [   ] Not so well
    [   ] Not well at all

e. <u>By working together</u>, how well are these partners able to respond to the needs and problems of the community?

    [   ] Extremely well
    [   ] Very well
    [   ] Somewhat well
    [   ] Not so well
    [   ] Not well at all

f. <u>By working together</u>, how well are these partners able to implement strategies that are most likely to work in the community?

[   ] Extremely well
[   ] Very well
[   ] Somewhat well
[   ] Not so well
[   ] Not well at all

g. <u>By working together</u>, how well are these partners able to obtain support from individuals and organizations in the community that can either block the partnership's plans or help move them forward?

[   ] Extremely well
[   ] Very well
[   ] Somewhat well
[   ] Not so well
[   ] Not well at all

h. <u>By working together</u>, how well are these partners able to carry out comprehensive activities that connect multiple services, programs, or systems?

[   ] Extremely well
[   ] Very well
[   ] Somewhat well
[   ] Not so well
[   ] Not well at all

i. <u>By working together</u>, how well are these partners able to clearly communicate to people in the community how the partnership's actions will address problems that are important to them?

[   ] Extremely well
[   ] Very well
[   ] Somewhat well
[   ] Not so well
[   ] Not well at all

Leadership

Please think about all of the people who provide either formal or informal leadership in this partnership. Please rate the <u>total effectiveness</u> of your partnership's leadership in each of the following areas:

    a.   Taking responsibility for the partnership

            [   ] Excellent
            [   ] Very good
            [   ] Good
            [   ] Fair
            [   ] Poor
            [   ] Don't know

    b.   Inspiring or motivating people involved in the partnership

            [   ] Excellent
            [   ] Very good
            [   ] Good
            [   ] Fair
            [   ] Poor
            [   ] Don't know

    c.   Empowering people involved in the partnership

            [   ] Excellent
            [   ] Very good
            [   ] Good
            [   ] Fair
            [   ] Poor
            [   ] Don't know

    d.   Communicating the vision of the partnership

            [   ] Excellent
            [   ] Very good
            [   ] Good
            [   ] Fair
            [   ] Poor
            [   ] Don't know

    e.   Working to develop a common language within the partnership

            [   ] Excellent
            [   ] Very good
            [   ] Good
            [   ] Fair
            [   ] Poor
            [   ] Don't know

Please rate the underline total effectiveness of your partnership's leadership in:

f.   Fostering respect, trust, inclusiveness, and openness in the partnership

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

g.   Creating an environment where differences of opinion can be voiced

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

h.   Resolving conflict among partners

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

i.   Combining the perspectives, resources, and skills of partners

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

j.   Helping the partnership be creative and look at things differently

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

Please rate the total effectiveness of your partnership's leadership in:

k.   Recruiting diverse people and organizations into the partnership

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

Efficiency

1.   Please choose the statement that best describes how well your partnership uses the partners' financial resources.

[   ] The partnership makes excellent use of partners' financial resources.
[   ] The partnership makes very good use of partners' financial resources.
[   ] The partnership makes good use of partners' financial resources.
[   ] The partnership makes fair use of partners' financial resources.
[   ] The partnership makes poor use of partners' financial resources.

2.   Please choose the statement that best describes how well your partnership uses the partners' in-kind resources (e.g., skills, expertise, information, data, connections, influence, space, equipment, goods).

[   ] The partnership makes excellent use of partners' in-kind resources.
[   ] The partnership makes very good use of partners' in-kind resources.
[   ] The partnership makes good use of partners' in-kind resources.
[   ] The partnership makes fair use of partners' in-kind resources.
[   ] The partnership makes poor use of partners' in-kind resources.

3.   Please choose the statement that best describes how well your partnership uses the partners' time.

[   ] The partnership makes excellent use of partners' time.
[   ] The partnership makes very good use of partners' time.
[   ] The partnership makes good use of partners' time.
[   ] The partnership makes fair use of partners' time.
[   ] The partnership makes poor use of partners' time.

Administration and Management

We would like you to think about the administrative and management activities in your partnership. Please rate the effectiveness of your partnership in carrying out each of the following activities:

a.   Coordinating communication among partners

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

b.   Coordinating communication with people and organizations <u>outside</u> the partnership

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

c.   Organizing partnership activities, including meetings and projects
[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

d.   Applying for and managing grants and funds

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

e.   Preparing materials that inform partners and help them make timely decisions

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

Please rate the effectiveness of your partnership in:

f.   Performing secretarial duties

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

g.   Providing orientation to new partners as they join the partnership

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

h.   Evaluating the progress and impact of the partnership

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

i.   Minimizing the barriers to participation in the partnership's meetings and activities
        (e.g., by holding them at convenient places and times, and by providing
        transportation and childcare)

[   ] Excellent
[   ] Very good
[   ] Good
[   ] Fair
[   ] Poor
[   ] Don't know

Non-financial Resources

A partnership needs non-financial resources in order to work effectively and achieve its goals. For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

a. Skills and expertise (e.g., leadership, administration, evaluation, law, public policy, cultural competency, training, community organizing)

[   ] All of what it needs
[   ] Most of what it needs
[   ] Some of what it needs
[   ] Almost none of what it needs
[   ] None of what it needs
[   ] Don't know

b. Data and information (e.g., statistical data, information about community perceptions, values, resources, and politics)

[   ] All of what it needs
[   ] Most of what it needs
[   ] Some of what it needs
[   ] Almost none of what it needs
[   ] None of what it needs
[   ] Don't know

c. Connections to target populations

[   ] All of what it needs
[   ] Most of what it needs
[   ] Some of what it needs
[   ] Almost none of what it needs
[   ] None of what it needs
[   ] Don't know

d. Connections to political decision-makers, government agencies, other organizations/groups

[   ] All of what it needs
[   ] Most of what it needs
[   ] Some of what it needs
[   ] Almost none of what it needs
[   ] None of what it needs
[   ] Don't know

For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

    e.   Legitimacy and credibility

        [   ] All of what it needs
        [   ] Most of what it needs
        [   ] Some of what it needs
        [   ] Almost none of what it needs
        [   ] None of what it needs
        [   ] Don't know

    f.   Influence and ability to bring people together for meetings and activities

        [   ] All of what it needs
        [   ] Most of what it needs
        [   ] Some of what it needs
        [   ] Almost none of what it needs
        [   ] None of what it needs
        [   ] Don't know

Financial and Other Capital Resources

A partnership also needs financial and other capital resources in order to work effectively and achieve its goals. For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

    a.   Money

        [   ] All of what it needs
        [   ] Most of what it needs
        [   ] Some of what it needs
        [   ] Almost none of what it needs
        [   ] None of what it needs
        [   ] Don't know

    b.   Space

        [   ] All of what it needs
        [   ] Most of what it needs
        [   ] Some of what it needs
        [   ] Almost none of what it needs
        [   ] None of what it needs
        [   ] Don't know

For the following type of resources, to what extent does your partnership have what it needs to work effectively?

    c.   Equipment and goods

        [   ] All of what it needs
        [   ] Most of what it needs
        [   ] Some of what it needs
        [   ] Almost none of what it needs
        [   ] None of what it needs
        [   ] Don't know

Decision Making

    a.   How <u>comfortable</u> are you with the way decisions are made in the partnership?

        [   ] Extremely comfortable
        [   ] Very comfortable
        [   ] Somewhat comfortable
        [   ] A little comfortable
        [   ] Not at all comfortable

    b.   How often do you <u>support</u> the decisions made by the partnership?

        [   ] All of the time
        [   ] Most of the time
        [   ] Some of the time
        [   ] Almost none of the time
        [   ] None of the time

    c.   How often do you feel that you have been <u>left out</u> of the decision making process?

        [   ] All of the time
        [   ] Most of the time
        [   ] Some of the time
        [   ] Almost none of the time
        [   ] None of the time

Benefits of Participation

For each of the following benefits, please indicate whether you have or have not received the benefit as a result of participating in the partnership.

    a.   Enhanced ability to address an important issue

            [   ] Yes
            [   ] No

    b.   Development of new skills

            [   ] Yes
            [   ] No

    c.   Heightened public profile

            [   ] Yes
            [   ] No

    d.   Increased utilization of my expertise or services

            [   ] Yes
            [   ] No

    e.   Acquisition of useful knowledge about services, programs, or people in the community

            [   ] Yes
            [   ] No

    f.   Enhanced ability to affect public policy

            [   ] Yes
            [   ] No

    g.   Development of valuable relationships

            [   ] Yes
            [   ] No

    h.   Enhanced ability to meet the needs of my constituency or clients

            [   ] Yes
            [   ] No

    i.   Ability to have a greater impact than I could have on my own

            [   ] Yes
            [   ] No

As a result of your participation in the partnership, have you experienced the following benefits:

j.   Ability to make a contribution to the community

[   ] Yes
[   ] No

k.   Acquisition of additional financial support

[   ] Yes
[   ] No

Drawbacks of Participation

For each of the following drawbacks, please indicate whether or not you have or have not experienced the drawback as a result of participating in this partnership.

a.   Diversion of time and resources away from other priorities or obligations

[   ] Yes
[   ] No

b.   Insufficient influence in partnership activities

[   ] Yes
[   ] No

c.   Viewed negatively due to association with other partners or the partnership

[   ] Yes
[   ] No

d.   Frustration or aggravation

[   ] Yes
[   ] No

e.   Insufficient credit given to me for contributing to the accomplishments of the partnership

[   ] Yes
[   ] No

f.   Conflict between my job and the partnership's work

[   ] Yes
[   ] No

Comparing Benefits and Drawbacks

So far, how have the benefits of participating in this partnership compared to the drawbacks?

[   ] Benefits greatly exceed the drawbacks
[   ] Benefits exceed the drawbacks
[   ] Benefits and drawbacks are about equal
[   ] Drawbacks exceed the benefits
[   ] Drawbacks greatly exceed the benefits

Satisfaction with Participation

a.   How satisfied are you with the way the people and organizations in the partnership work together?

[   ] Completely satisfied
[   ] Mostly satisfied
[   ] Somewhat satisfied
[   ] A little satisfied
[   ] Not at all satisfied

b.   How satisfied are you with your influence in the partnership?

[   ] Completely satisfied
[   ] Mostly satisfied
[   ] Somewhat satisfied
[   ] A little satisfied
[   ] Not at all satisfied

c.   How satisfied are you with your role in the partnership?

[   ] Completely satisfied
[   ] Mostly satisfied
[   ] Somewhat satisfied
[   ] A little satisfied
[   ] Not at all satisfied

d.   How satisfied are you with the partnership's plans for achieving its goals?

[   ] Completely satisfied
[   ] Mostly satisfied
[   ] Somewhat satisfied
[   ] A little satisfied
[   ] Not at all satisfied

e.	How satisfied are you with the way the partnership is implementing its plans?

[   ] Completely satisfied
[   ] Mostly satisfied
[   ] Somewhat satisfied
[   ] A little satisfied
[   ] Not at all satisfied

·FOUNDRY·

WHERE WELLNESS TAKES SHAPE

Partnership Self-Assessment Report Template
Foundry (INSERT SITE)

Prepared by:
[Name]
[Date]

Overview

Survey Description

The Partnership Self-Assessment Tool is a questionnaire that various partners can complete to examine the strengths and weakness of the partnership. Answers can help guide organizations and individuals to make the partnership increasingly successful. The tool measures a key indicator of a successful collaborative process: synergy (partnership synergy).

Why is this survey needed?

At Foundry, we have chosen to adopt this tool to help partners at each of our Foundry Centre assess how well their collaborative process is working or what they can do to make it work better.
- The Tool measures a key indicator of a successful collaborative process -- the partnership's level of synergy.
- The Tool also provides information that helps partnerships take action to improve the collaborative process.
- It identifies the partnership's strengths and weaknesses in areas that are known to be related to synergy -- leadership, efficiency, administration and management, and sufficiency of resources.
- It also measures partners' perspectives about the partnership's decision making process, the benefits and drawbacks they experience as a result of participating in the partnership, and their overall satisfaction with the partnership.

The survey forms one of the key measures for integration and will be repeated annually to track progress and inform quality improvement activities in the Foundry centre.

Survey Participants

(INSERT # OF PARTICIPANTS) participants representing different partner agencies completed the Self-Assessment Survey for your Foundry centre.

Self-Assessment Report Contents

Section 1: Overall Results for Partnership Functioning

This section presents an overview of partnership's synergy as well as partnerships' strengths and weaknesses in five areas that are known to be related to synergy.

Section 2: Detailed survey results

This section presents the breakdown of aggregated responses to individual questions in the questionnaire

Section 1: Partnership Functioning

Area	Description	2018 Score	2018 Zone	2019 Score	2019 Zone
Synergy	The extent to which the partnership can do more than any of its individual participants	3.8	Work		
Leadership Effectiveness	Leadership that promotes productive interactions among diverse people and organizations	3.4	Work		
Partnership Efficiency	Measure of how well a partnership optimizes the involvement of its partners	3.3	Work		
Administration and Management Effectiveness	Administration and management that supports collaboration. This has been described as very different from bureaucratic forms of management	3.0	Work		
Sufficiency of Non-financial Resources	Adequacy of non-financial resources	3.4	Work		
Sufficiency of Financial Resources	Adequacy of financial resources	3.8	Work		

Zones Key

Danger Zone	1.0 – 2.9	This area needs a lot of improvement
Work Zone	3.0 – 3.9	More effort is needed in this area to maximize the partnership's collaborative potential
Headway Zone	4.0 – 4.5	Your partnership is doing pretty well in this area but has potential to progress even further
Target Zone	4.5 – 5.0	Your partnership currently excels in this area and needs to focus attention on maintaining a high score

Section 2 – Detailed Survey Results

SYNERGY

How well, by working together, the participants in your partnership are able to:	Partnership Mean
Identify new and creative ways to solve problems	4.2
Include the views and priorities of the people affected by the partnership's work	3.9
Develop goals that are widely understood and supported among partners	3.7
Identify how different services and programs in the community relate to the problems the partnership is trying to address	4.0
Respond to the needs and problems of the community	3.8
Implement strategies that are most likely to work in the community	3.8
Obtain support from individuals and organizations in the community that can either block the partnership's plans or help move them forward	3.5
Carry out comprehensive activities that connect multiple services, programs, or systems	3.8
Clearly communicate to people in the community how the partnership's actions will address problems that are important to them	3.6

Your partnership is achieving a given attribute of synergy *extremely well* if the mean score is 5, *very well* if the score is 4, *somewhat well* if the score is 3, *not so well* if the score is 2, and *not well at all* if the score is 1.

Partnerships that achieve a score of 5 on all of the 9 attributes have a collaborative process that is successfully making the most of collaboration.

LEADERSHIP EFFECTIVENESS

Leadership Attributes:	Partnership Mean
Taking responsibility for the partnership	3.2
Inspiring and motivating people in the partnership	3.4
Empowering the people in the partnership	3.6
Communicating the vision of the partnership	3.5
Working to develop a common language within the partnership	3.4
Fostering respect, trust, inclusiveness, and openness in the partnership	4.1
Creating an environment where differences of opinion can be voiced	3.5
Resolving conflict among partners	2.8
Combining the perspectives, resources, and skills of partners	3.7
Helping the partnership be creative and look at things differently	3.5
Recruiting diverse people and organizations into the partnership	3.2

The effectiveness of your partnership's leadership is *excellent* if the mean score is 5, *very good* if the score is 4, *good* if the score is 3, *fair* if the score is 2, and *poor* if the score is 1.

Partnerships that achieve a score of 5 on all of the 11 attributes have the kind of leadership that promotes a high level of synergy.

PARTNERSHIP EFFICIENCY

How well your partnership is using its partners':	Partnership Mean
Financial resources	3.3
In-kind resources	3.5
Time	3.3

A mean score of 5 is *excellent,* a score of 4 is *very good,* a score of 3 is *good,* a score of 2 is *fair,* and a score of 1 is *poor.*

Partnerships that achieve a score of 5 in all 3 areas are optimizing the involvement of their participants in a way that promotes synergy.

ADMINISTRATION AND MANAGEMENT EFFECTIVENESS

Administration and Management Activities:	Partnership Mean
Coordinating communication among partners	3.7
Coordinating communication with people and organizations outside the partnership	2.5
Organizing partnership activities, including meetings and projects	3.7
Applying for and managing grants and funds	2.6
Preparing materials that inform partners and help them make timely decisions	3.9
Performing secretarial duties	2.1
Providing orientation to new partners as they join the partnership	2.7
Evaluating the progress and impact of the partnership	2.9
Minimizing barriers for participation in partnership meetings	3.0

The effectiveness of your partnership's administration and management is *excellent* if the respondents' means score is 5, *very good* if the score is 4, *good* if the score is 3, *fair* if the score is 2, and *poor* if the score is 1.

Partnerships that achieve a score of 5 on all the 9 activities have the kind of administration and management that promotes a high level of synergy.

SUFFICIENCY OF NON-FINANCIAL RESOURCES

Kinds of Non-Financial Resources:	Partnership Mean
Skills and expertise	3.4
Data and information	2.7
Connections to target populations	3.5
Connections to political decision-makers, government agencies and others	2.9
Legitimacy and credibility	4.0
Influence and ability to bring people together for meetings/activities	3.9

Your partnership has *all of what it needs* if the mean score is 5, *most of what it needs* if the score is 4, *some of what it needs* if the score is 3, *almost none of what it needs* if the score is 2, and *none of what it needs* if the score is 1.

Partnerships that achieve a score of 5 for all 6 resources have the basic building blocks to achieve high levels of synergy.

SUFFICIENCY OF FINANCIAL RESOURCES

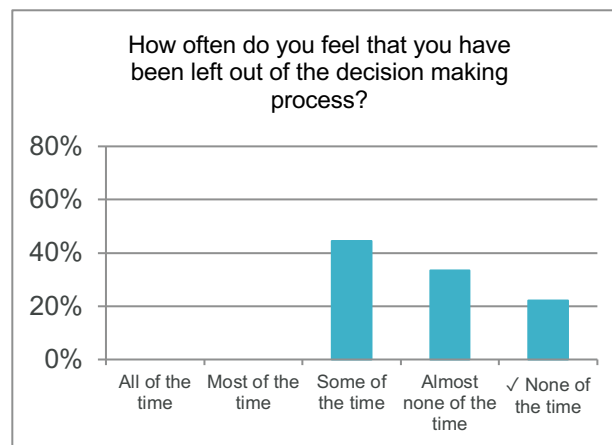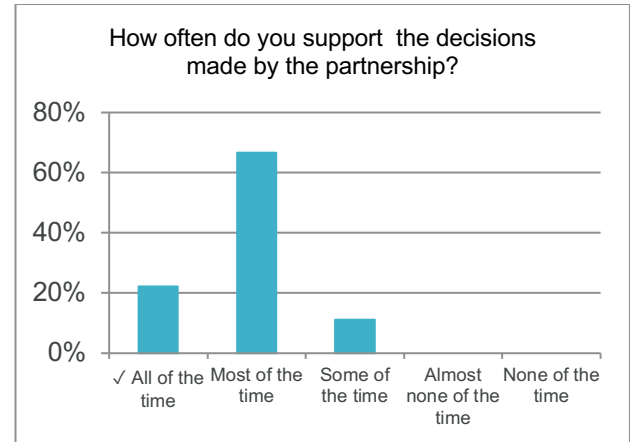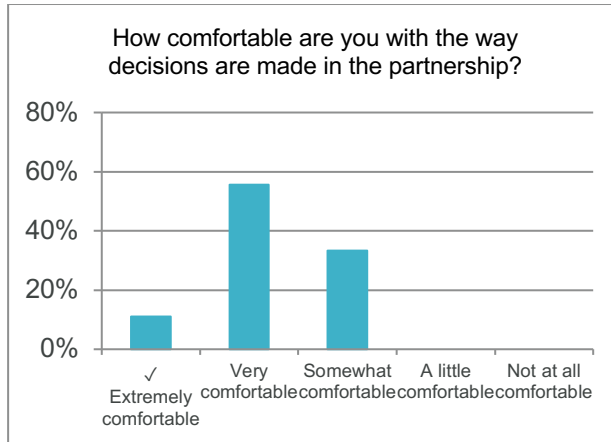| Kinds of Financial and other Capital Resources:	Partnership Mean
Money	3.1
Space	4.6

Your partnership has *all of what it needs* if the mean score is 5, *most of what it needs* if the score is 4, *some of what it needs* if the score is 3, *almost none of what it needs* if the score is 2, and *none of what it needs* if the score is 1.

Partnerships that achieve a score of 5 for all 2 resources have the basic building blocks to achieve high levels of synergy.

DECISION MAKING PROCESS

(REPLACE)


How comfortable are you with the way decisions are made in the partnership?

How often do you support the decisions made by the partnership?

How often do you feel that you have been left out of the decision making process?

BENEFITS & DRAWBACKS

(REPLACE)

Kinds of Benefits	Percent Receiving
Enhanced ability to address an important issue	100%
Development of valuable relationships	100%
Ability to have a greater impact than I could have on my own	100%
Ability to make a contribution to the community	100%
Acquisition of useful knowledge about services, programs, or people in the community	94%
Development of new skills	89%
Enhanced ability to meet the needs of my constituency or clients	88%
Heightened public profile	83%
Increase utilization of my expertise or services	83%
Enhanced ability to affect public policy	72%
Acquisition of additional financial support	63%

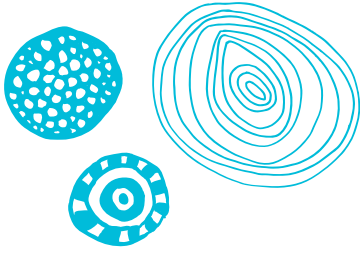| Kinds of Drawbacks	Percent Experiencing
Diversion of time and resources away from other priorities or obligations	72%
Insufficient influence in partnership activities	61%
Conflict between my job and the partnership's work	61%
Frustration or aggravation	50%
Viewed negatively due to association with other partners or the partnership	50%
Insufficient credit given to me for contribution to the accomplishments of the partnership	50%

OVERALL SATISFACTION
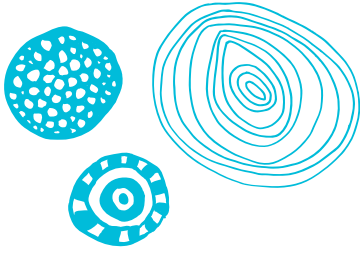
Master Operating Agreement Overview

Additional material available on the Foundry Website.

APPENDIX E

Youth and Family Engagement

E.1 Information Sheet: Engagement Roles and Responsibilities

E.2 Foundry Centre Engagement Standards

E.3 Template: Youth Advisory Committee Recruitment Poster

E.4 Template: Community Agreement

E.5 Template: Youth Advisory Committee Meeting Agenda/Notes

E.6 Example: Foundry Maple Ridge Engagement Plan

E.7 Example: Foundry Richmond Community Engagement Plan

E.8 Example: Foundry Prince George Community Agreement

Engagement Roles and Responsibilities

FCO Youth Peer Engagement Coordinator(s)	- Staff member(s) of FCO team - Brings lived/ living experience to support youth engagement across Foundry's provincial network - Facilitates and co-leads YFEWG, OG-YAC & FACC - Works closely with the Family Engagement & Service Provider Liaison
FCO Family Engagement	- Staff member(s) of FCO team - Brings lived/ living experience to support family engagement, development & implementation of family services (including family peer support) across Foundry's provincial network - Facilitates and co-leads YFEWG, PFA & Family Services Working group - Works closely with the Youth Peer Engagement Coordinator(s)
YFEWG **Youth & Family Engagement Working Group**	- Consists of Foundry centre staff members who lead engagement at the centre level (in most cases, this is the Youth & Family Engagement Coordinators, or equivalent) - Monthly community of practice calls facilitated by FCO - Members support centres in implementing meaningful youth and family engagement within the network - Develops collective vison and common working goals - Provides knowledge exchange opportunities - Connects community peer groups through service provider liaison
OG-YAC **Organizational Governance-Youth Advisory Committee**	- Foundry's provincial YAC - Works to expand & strengthen the provincial level of youth in leadership working directly with FCO – to ensure youth participation & youth voice informs the work we do at FCO 1-2 young people from each local Foundry YAC is invited to join (done through a recruitment process organized between the FCO Youth Peer Engagement Coordinator & the centre Youth & Family Engagement Coordinator, or equivalent) - Members co-lead OG-YAC operations alongside FCO Youth Peer Engagement Coordinator

	• Works to build individual and group capacity – this includes identifying training & skill-specific development opportunities • Act as a liaison between OG-YAC/FCO and local YAC/Foundry centre when necessary
PFA **Provincial Family Ambassadors**	• Foundry's provincial family/ caregiver advisory committee • Lead family representatives from each site who work directly with Foundry central office • 1-2 family member/caregivers from each local Foundry PAC is invited to join (done through a recruitment process organized between the FCO Family Coordinator & the centre Youth & Family Engagement Coordinator, or equivalent) • Encourages family voice and participation in Foundry operational decision-making • Expands Provincial level role of families/caregivers in leadership • Creates opportunities for family professional & personal development • Co-creates working goals specific to caregiver needs • Act as a liaison between PFA/FCO and local PAC • Supports community engagement and development
FACC: YAS **Forging Access to Care Committee: Youth Awareness Strategy**	• Youth advisory that provides direct support and expertise to Foundry's Clinical Working Group (CWG), led by FCO Director of Services & Innovation • Co-led by FCO Youth Peer Engagement Coordinator and when appropriate, FCO Director of Services & Innovation • Current membership is open to youth living in Vancouver & lower mainland, due to the nature of the work required • Inform the development, implementation & fidelity of service-related matters (documents & processes) • Current 2019-2020 project is the Youth Awareness Strategy (YAS): aims to increase youth awareness of Foundry's services by using social media platforms as a tool
VC YAC	• Project-specific youth advisory that provides direct & ongoing support to the development of Foundry's virtual care project

Virtual Care Youth Advisory Committee	• Membership consists of young people from across B.C. – those who have a Foundry centre in their home community and those who do not. Recruitment has finished. • Committee is co-led by FCO Virtual Care Project Manager, who liaises with FCO Youth Peer Engagement Coordinator(s) when necessary

Foundry Centre Engagement Standards

Version 1.0- updated April 28, 2020

The following standards were developed by members of Foundry's Youth and Family engagement network. They outline core requirements to align with practice principles and ensure that the voices of young people, family and caregivers remain at the centre.

Role/Group	Engagement Standards
Youth & Family Engagement Coordinator (or equivalent)	This role is a staff member identified by Lead Agency to coordinate & liaise with FCO around youth & family engagement opportunities & activities – this includes, but not limited to: • Is the identified lead for youth & family engagement at a local level • Attends monthly YFEWG calls & meaningfully contributes to the community of practice by providing feedback, input & support as needed (more on YFEWG below) • Coordinates & supports local YAC & FAC (Youth Advisory Committee & Family Advisory Committee)
Youth Advisory Committee (YAC)	Consisting of young people accessing the Foundry centre, the YAC works to ensure the centre is for young people, by young people. This is done through not only elevating the youth voice to advise and inform the development of services, resources and other opportunities, but also includes the following: • Embedded on the principle of reciprocity • Goals are co-created • Provide and offer a range of engagement activities at varying levels • At minimum, 1 YAC meeting per month • Terms of Reference (ToR) and Community Agreement is developed & reviewed annually • Honoraria is provided to compensate members for their time & expertise • Ongoing feedback loop is maintained between YAC members & Foundry centre staff and decision makers to ensure transparency and the feedback given is action orientated & impacts decision making • Have 1-2 local YAC members join the OG-YAC, Foundry's provincial YAC (more below) • Other tools: Sample YAC recruitment poster
Family Advisory Committee (FAC)	Consisting of family members/ caregivers of youth accessing the Foundry centre, the FAC ensure that at a family voice and the unique needs of families/caregivers is represented in all aspects of Foundry centre operations.

	The same engagement standards for YACs apply to FACs: • Embedded on the principle of reciprocity • Goals are co-created • Provide and offer a range of engagement activities at varying levels • At minimum, 1 FAC meeting per month • Terms of Reference (ToR) and Community Agreement are developed & reviewed annually • Honoraria is provided to compensate members for their time & expertise • Ongoing feedback loop is maintained between FAC members & Foundry centre staff and decision makers to ensure transparency and the feedback given is action orientated & impacts decision making • Have 1-2 local FAC members join the PFA - Provincial Family Ambassadors (more below)
Local Leadership Table	Foundry centres will ensure that their Local Leadership Table: • Has the membership of min. 2 youth & min. 1 family member/ caregiver • Youth & family member/ caregivers are compensated by the Lead Agency for their time on the Local Leadership Table • Identifies an adult ally: this individual is responsible for supporting the youth & family member/ caregiver's meaningful participation and attendance at the leadership table. This includes providing administrative, emotional & accessibility support as well as any other facilitators to support the youth and family member/ caregiver. • Support the youth & family member/ caregiver to liaise between the YAC & FAC and the Local Leadership Table. This may include the involvement of the Youth & Family Engagement Coordinator (or equivalent)

Join the Foundry Youth Advisory Council!

...You might be asking, what's a Foundry? Well, Foundry North Shore is a wellness centre that offers many free, confidential health and support services for folks ages 12-24.

The Foundry YAC is looking for people 12-24 who want to be involved in mental health initiatives and keeping Foundry youth-friendly.

In the YAC, we...
~ Make a meaningful difference in our community
~ Discuss topics like youth mental wellness and substance use
~ Meet other awesome people
~ Have twice-monthly meetings
~ Get volunteer hours
~ ...And more!

Contact ▮▮▮▮ if you're interested!
▮▮▮▮▮▮▮▮▮ / ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
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· F O U N D R Y ·
WHERE WELLNESS TAKES SHAPE

Provincial Family Ambassadors:
## Community Agreement

(Adapted from the Community Agreement used in the Youth and Family Inclusion Group (Y-Fi) at Foundry Abbotsford)

This Community Agreement provides guidelines for how we want to come together, to work together and to learn from and with each other in the Foundry Central Family Ambassador Team.

Agenda will be sent out before each meeting for review. Members will have the opportunity to amend or add to agenda at beginning of each meeting.

In an atmosphere of mutual respect, we agree to:

- **Respect the time of all members, we want to start and end on time.**
- **One person to speaking at a time, allowing people to finish their thoughts before voicing your own.**
- **Be as fully present in the meeting as possible. Please consider turning cellphones off and avoid side conversations.**
- **Welcome and encourage balanced participation, respecting all perspectives, thoughts, feedback and questions.**
- **Open space where every member feels they have the opportunity to be heard and voice their thoughts.**
- **Approach differences from a perspective of curiosity rather than judgement**
- **Address conflict with a focus on the problem not the person**
- **Communicate with respect, care, empathy and compassion**
- **Acknowledge and manage any power imbalances that could be impeding open and safe dialogue**
- **"What's said here stays here; what's learned here leaves here". Anything shared outside of the group needs explicit consent of how it will be shared.**
- **Ask questions, all questions are good questions and important to our work.**
- **Take responsibility for ensuring this agreement is respected by speaking up with diplomacy and care when the guidelines are broken.**
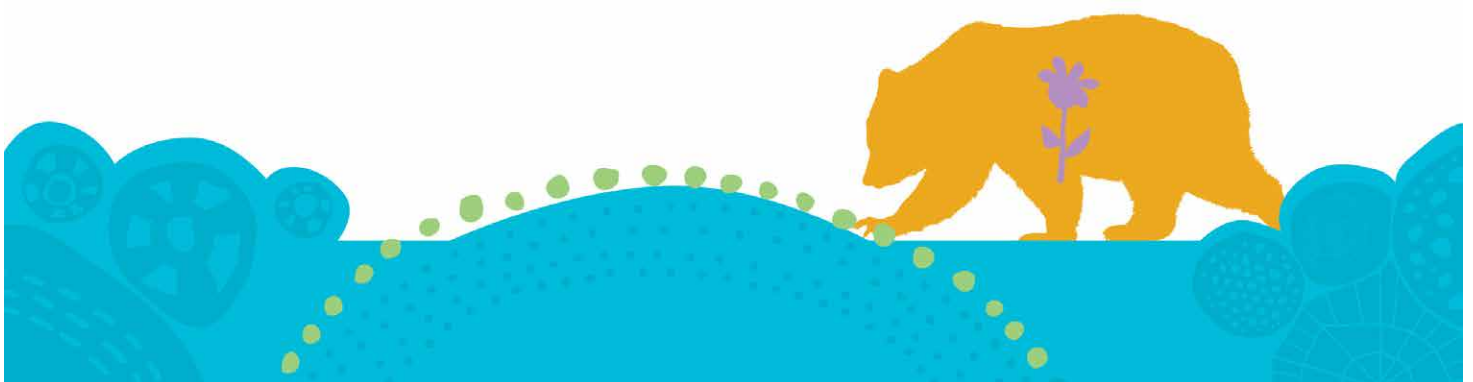
Example of YAC Meeting Agendas

Example 1: meeting agenda from Foundry North Shore YAC

Foundry North Shore YAC Meeting Agenda
Feb. 8/18

1) Check-in, review of safe space guidelines

2) YAC leadership update, brainstorm

3) YAC Terms of Reference – review & feedback

4) Review of brainstormed activities, prioritizing

5) YAC cash: How to spend?

6) Leadership Council – youth rep needed

7) Closing/wishes for next meeting

Example 2: Foundry staff/ facilitator notes for meeting agenda from Foundry North Shore YAC

YAC Meeting – Dec. 12/19
Meeting Agenda & Notes

*On board: agenda, member responsibilities/safe space guidelines, projects (with space!)

*Large paper

Check-in

- Round intros – name, pronoun, get-to-know-you question (*Christmas/holiday one? Or ask them?)
- Icebreaker – interview
    - Pairs, find out 3 interesting things about them – at least 2 must be deeper than favourite thing
    - Report back to group on partner after

Member responsibilities/safe space stuff

- Put up what we brainstormed last time, as well as what's in our TOR that the YAC has brainstormed before
- Anything people want clarification on/disagree with, anything new they want to include?
- Highlighting assuming good intentions, being open – can be tough sitting in a room with all new ppl and making ourselves vulnerable like this, when we're trying to make decisions together, we might all react differently to that vulnerable feeling – just know that we're all probably feeling somewhat similarly in that way, and probably hoping that we can all connect and get along – you probably wouldn't be here if you didn't want that on some level!

Discussion of project options

- Went over these in detail last time – handout for you to reference to jog your memory
- Review █████'s new ideas
    - **Taking on smaller vs. bigger projects** (did briefly mention last time) - █████'s thoughts on this (see email)
        - **Helping to re-design our front waiting room**
            - Organizing **games**
        - **Hosting an event to gather youth feedback on Foundry**
        - **Organizing real plants**
        - **Making mobiles**
- Otherwise – other projects are as we discussed (handout)
- Other ideas?
- Ideally, want to try and choose a focus
    - E.g. can be one project we all focus on every meeting; can be two where we switch off working on them, like last year; can also be multiple projects that we could strategize how to work on them – i.e. a different project every meeting, members work on projects in-between meetings (as multiple projects will mean stuff will take longer to do, as opposed to focussing on fewer)

FOUNDRY MAPLE RIDGE
January 16, 2019

This engagement plan documents the proposed engagement process which will supplement and enhance the design development of the new Foundry Maple Ridge location. This space will be taking over an existing clinic and diner in the heart of the Maple Ridge community.

Community engagement will be critical to the success of the project, and provide youth and their families the opportunity to have their voices heard. A sense of ownership and belonging transforms the way the community sees themselves in that space; it's elevated from being institutional to integral—inclusive of the thoughts, feelings, and intentions of the people who will be inhabiting it.

1.0 Approach

Engagement for this project will be delivered through a variety of contact points, including a combination of interactive events and digital communications. WORK Design Studio will prepare engagement content specific to each event and stakeholder group, as detailed below.

Format and deliverables will be prepared by WORK Design Studio, and reviewed by the Foundry Maple Ridge Project Team, and distributed by a Foundry representative to the appropriate recipients.

2.0 Participants

The Foundry Maple Ridge Project Team has identified a number of key stakeholder groups to participate in engagement activities. Engagement sessions may be tailored towards specific groups, as outlined below.

- Youth, Parents, Service Providers
- Direct Partners (Specialists and Physicians)
- Fund Development Committee
- Funders Table
- Clinic Operations
- Steering Committee
- Community of Maple Ridge

3.0 Contact Points

Contact points are as follows, outlined by interactive engagement activities and associated communications:

3.1 Pre-Design

3.1.A   Youth Engagement Kick-Off   (February, 2019)

- Provide content for newsletter and e-introduction to project (to be distributed by Foundry)

- *Youth Tour of Foundry Abbotsford (to be conducted by Foundry) to occur prior to engagement kick-off event
- Informal + Interactive Activity TBD (to be scheduled by Foundry)
    - Act as a Meet + Greet and Ice Breaker between youth and design team
    - Encourage informal conversation and engagement
    - Spark discussion on Foundry Abbotsford: what they liked, what they wish was included, what they reacted to
- Provide findings summary to Project Team

3.1.B   Direct Partners Discussion   (February, 2019)

- Email introduction to project and design team
- Invitations sent asap (to be distributed by Foundry)
- Review outline of functional program, determined by Foundry Design Guidelines
    - Functional Description
    - Operational Description
    - Staffing + Future Growth
    - Space Requirements + Workflow
    - Equipment Needs
- Thank you and Next Steps email sent one day after discussion

3.1.C   Steering Committee Meeting   (March 7, 2019)

- Introduction to design team
- Project Update: overall status, schedule, milestone deliverables
- Program Review (space summary, operational and functional descriptions, adjacencies)

3.2 Schematic Design

3.2.A   Community Town Hall   (March, 2019)

- Community event to introduce project, goals, drivers, project team
- Key attendees may include: Direct Partners, Youth, Committees, City
- Invitations and event awareness to be undertaken by Foundry
- Intent to encourage participation and input on key design elements and principals (approved by Foundry Project Team)
    - Design Charette stations with visuals, pin-up, coloured stickers for preferences, variety of design options
    - Think Tank on ways to reflect community of Ridge Meadows within the space
- Summary of findings for Project Team to review within one week of the event

3.2.B   SD Report

- Provide a brief digital report showing design to date
    - Schematic plans/imagery/sketches
- Highlight summary of findings/feedback from pre-design engagement
    - Capture feedback from Town Hall
- Identify next steps
- Request Sign-Off from Foundry Project Team

3.3 Design Development

3.3.A   Youth Engagement

- Propose: Pizza Party + Discussion
- Informal round table discussion and presentation to highlight design of Foundry Maple Ridge – emphasis on how input from pre-design has been reflected to date, opportunities for further input (furniture, art, finishes)
- Review of preliminary furniture and finishes

3.3.B   (Optional) Arts + Crafts Event

- Opportunity for sponsors/donations, community engagement
- Start foundation for Foundry Maple Ridge Art Bank (rotating works of art for youth centre)
- Identify opportunities for art based on design development. These opportunities are to be reviewed by Foundry Project Team, and could include:
  - Mural
  - Welcome wall
  - Multi-purpose room
  - Kitchen

3.3.C   Direct Partners Design Review

- Invitations sent three weeks prior (to be distributed by Foundry)
- Review design development
  - Workflow
  - Coordination with Foundry Design Guidelines
  - Preliminary Furniture, equipment, and finishes
  - Infection Control
  - Safety and security
  - Staff amenities and workspaces
- Thank you and Next Steps email sent one day after discussion

3.3.D   DD Report

- Provide a brief digital report to reflect design decisions and progress to date
  - Detailed plans/elevations/imagery/preliminary renderings
  - Branding/wayfinding/furniture/finishes
- Identify next steps
- Request Sign-Off from Foundry Project Team

4.0 Sign-Off

Please review and indicate your acknowledgement of the proposed engagement plan.

_____

Capital Projects | Foundry Central Office

_____

Principal | WORK Design Studio

_____

Executive Directive | Community Services BC

_____

Principal | WORK Design Studio

Foundry Centre for Youth – Richmond

Community Engagement Plan

Vancouver Coastal Health - Community Engagement
October 15, 2018

Project Leads: [NAME], Director MHSU and Residential Care, VCH
[NAME], Executive Director, Richmond Addiction Services Society

Project Manager: [NAME]

CE Lead: [NAME], Leader Community Engagement

1. Background

Foundry Centres are integrated health and social service centres for young people ages 12-24. Foundry centres provide a one-stop-shop for young people to access mental health care, substance use services, primary care, social services and youth and family peer supports. The goal is to provide safe, non-judgmental care, information and resources, and work to reach young people earlier – before health challenges become problematic. Foundry brings health and social services together in a single place to make it easier for young people to find the care, connection and support they need.

Foundry centres take a prevention and early intervention approach, offering mental health and substance use services, primary care, peer support and social services in 1 place and will improve access and navigation of services by also including peer and family engagement and support. Foundry centres want to reach young people early so that help is available sooner and can address small problems before they become bigger ones.

Richmond Addictions Services will be the lead agency for developing a Foundry centre in Richmond and will be working with VCH as a partner. The Foundry Richmond centre will work in collaboration with the entire community and community agencies to ensure that Richmond young people, ages 12 – 24, will have access to a one-stop-shop for health and social services.

The Richmond Foundry Centre will aim to reduce stigma associated with receiving mental health support by providing a variety of services in one place in an integrated manner. The planned centre will greatly enhance the services available to young people, but more importantly, it will bring more services together in one place in an integrated manner.

2. VCH-CE Plan for Coordination and Implementation of Engagement Activities

VCH-CE will provide oversight and continuity for community engagement including:

- planning and logistical support to hold focused discussions with Richmond youth clients, their families, residents of Richmond and community partners to inform design and implementation phases of the project
- planning and logistical support to hold focused discussions with VCH Richmond staff to inform design and implementation phases of the project
- Support long-term engagement through support for advisors on a steering committee.
- Provide dedicated Community Engagement Leader to the project.

Objectives and Key Activities:

- To maintain consistent, quality engagement throughout the duration of project planning, implementation and transitions
- To provide engagement leadership to the VCH Project Team
- To implement and provide oversight of the consultation program
- To work closely with VCH Communications and Foundry Communications to ensure coordinated communications support for all engagement activities
- To maintain relationships with key community stakeholders and if required act as contact for stakeholders throughout the engagement process
- To work with community stakeholders to help mitigate risks to the project and work toward solutions
- To support longitudinal engagement via advisors on steering committees/working groups etc.

For this project, stakeholders include:

- Current Clients and users of Youth MHSU services
- Potential clients and users of Foundry services
- Community organizations who provides services to youth
- Staff of services that will be located in Foundry

3. Goals of Engagement

- increase awareness and understanding of Foundry and the services that will be provided
- understand and address concerns related to the Foundry Centre, its services and practice

- support staff understanding of changing practice and address concerns
- inform planning and implementation for site and service model

4. Timelines and Activities

DATE	ACTIVITY	NOTES
October – November 2018	**Discussions with project team to plan engagement process.**	• Consultation planning, identification of scope of project, relevant stakeholders and identification of appropriate locations and timing for engagement processes and activities.
January 2019	**Develop messaging for Foundry Website**	• Design messaging and promotion for engagement sessions to post to Foundry website and distribute community wide
February – April 2019	**Focus Groups** **Information and Consultation**	• Develop invitation for potential attendees. • Develop session facilitation guide • Work with project manager to confirm spaces to hold engagement events • Hold 2-3 sessions with current clients of MHSU youth services and their families (consider holding a session in Cantonese). • Hold 2 sessions with potential clients of Foundry and their families (consider holding a session in Cantonese). • Hold 1 session with community partners and organizations providing services for youth • Hold 2 staff engagement sessions – in conjunction with Project team • Develop and maintain distribution lists of all those interested in Foundry project for future information sharing and engagement • Gather contact info for individuals interested in participating on Advisory Committee • Provide summaries of all sessions to be posted on website and shared broadly
April 2019	**Advisory Committee**	• Support formation of advisory committee to guide project to completion. • CE to support initial meetings to set terms of reference and goals
September 2019	**Community Information Sessions**	• Support advisory committee to plan broad community information session with neighbours and other interested groups

DATE	ACTIVITY	NOTES
Ongoing	**Support project team to embed feedback from engagement process into project planning**	• Attend meetings and debriefs as required.

·FOUNDRY·
PRINCE GEORGE

FOUNDRY Team Commitments

Team Member Name: _____   Date: _____

FOUNDRY VISION

Foundry will transform how youth and young adults access health and social services within BC.

FOUNDRY PROGRAM PURPOSE

Provide a system of care for youth and young adults through Integrated Youth Service Centres and e-services across British Columbia.

GUIDING PRINCIPLES

- Be a unified team nurturing the relationship with Foundry.
- Physical, emotional, mental, cultural and spiritual safety are paramount.
- Be accountable to ourselves, each other and the people we serve, using our knowledge and skills to help meet their needs while acknowledging our limitations.
- Be continually responsive and transparent to young people's needs when they enter Foundry.
- Be flexible with our process to prevent barriers to support.
- Strengthen and create connections in the community to empower a young person's ability to navigate their needs in the future.
- Find opportunities to cultivate a balanced, creative and joyful environment.

MUTUAL COMMITMENTS TO THE TEAM

- We talk to each other not about each other.
- We build each other up through encouragement.
- We value all voices.
- We will respect and support team decisions.
- We strive to be open, honest and non-judgmental with one another.
- We approach each other with continuous compassionate curiosity.
- We reflect to ensure our feedback is thoughtful, honest, necessary and timely.
- We strive to respond rather than react.
- We strive to keep each other's self-esteem and relationships intact.
- We view feedback as an opportunity for growth.
- We look for opportunities to celebrate each other.
- We keep ourselves and each other accountable to follow our commitments.

1148 7th Avenue, Prince George, BC V2L 5G6   www.foundrybc.ca

YMCA of Northern BC

BRITISH COLUMBIA

CORE VALUES FRAMEWORK

Am I doing this with:
- Kindness
- Curiosity
- Integrity

Am I being:
- Inclusive
- Responsive

Am I promoting:
- Connection
- Empowerment
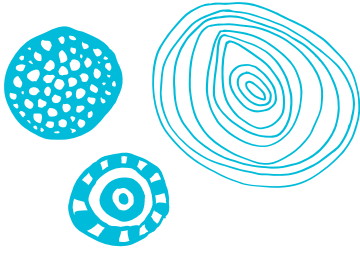
OUR COMMITMENTS TO THE YOUTH

- We focus on wellness and empowerment of young people to live a balanced and fulfilling life.
- We believe confidentiality and consent are the foundation to creating trust which is paramount to delivering safe and effective services.
- We do not call those accessing Foundry clients or patients; we call them youth or young people.
- We are a voluntary, youth-driven service with no formal referral process.
- We are committed to young people receiving immediate, safe, age appropriate services with minimal barriers to access them.
- We use the word engagement, not intake, to explain a young person accessing services.
- We focus on the young people accessing services creating a relationship with Foundry and identify ourselves as a member of the Foundry team.
- We provide multiple points of access to take immediate advantage of an individual's motivation to access services.
- We will provide opportunities for young people that access to Foundry to leave with a tool or a resource.
- We acknowledge, support and develop the formal and informal strengths and supports young people possess.
- We work with the community and other agencies to support connections and transitions to other services.
- We are committed to the health and wellness of our team members who provide services at Foundry.

As a member of the Foundry team, I have read and agree to abide by the Foundry Team Commitments.

_____

Signature

www.foundrybc.ca

Communications and Branding

Information Sheet: Foundrybc.ca Website

Foundry's online platform, **foundrybc.ca**, offers information, online tools, resources, and connections to services for young people and their families/caregivers across BC. Foundrybc.ca includes content on mental health and well-being, substance use, social support and services, navigation assistance and self-management. Foundry encourages centre service providers to become familiar with the tools and resources available through this site and to share this content with the youth and families/caregivers they serve.

The **Information and Tools** section of the site covers topics related to mental health, substance use, healthy living, everyday life and tough topics. Each section includes selected apps and online tools related to that topic.

Mental Health	**Substance Use**	**Healthy Living**	**Everyday Life**	**Tough Topics**
• Anxiety • Body Image & Eating • Low Mood & Depression • Questioning Reality • Stress	• Alcohol • Cannabis • Opioids • Vaping & Tobacco • Other Substances	• Healthy Eating & Active Living • Mindfulness • Relationships • Sexual Wellness • Sleep • Technology & You	• Housing • Money • Online Safety • School • Work	• Bullying • Loss & Grief • Self-Injury • Suicide • Violence & Abuse

Foundry's website also connects young people and families/caregivers to support services related to the topics above through the **Get Support** section, with information and links related to:

- Find a Foundry Centre
- Foundry Virtual
- Find Community Services
- Phone and Online Chat
- Peer Support
- School Counsellors
- Provincial Programs
- Other Health Professionals

All of the **Foundry Centres** have a centre-specific page on the foundrybc.ca website with contact information, hours of operation, services and other important centre information.

The **Supporting Others** section contains helpful information for friends, families/caregivers, and school and health professionals.

Foundry Pathfinder is a feature to help navigate the website's support resources. It is a 4-step tool to help young people find personalized support options.

Foundrybc.ca is powered by BC Children's Hospital. For questions about the website, please contact webinfo@foundrybc.ca.

Foundry Site-Specific Communications Plan Template

PURPOSE OF THIS DOCUMENT

This document is intended to help upcoming Foundry centres develop a strategic communications plan and communication activities. Communications plans vary in style and formats. This is optional for sites – if you have a style you prefer, please feel free to use it. If you would like assistance in filling out this template or support in communications planning, please contact Foundry Central Office for communications support. A communications plan is considered a "living" document and should be continuously updated and adjusted as new information is available.

OVERVIEW

A short synopsis of where you are now.

SWOT ANALYSIS

Strengths	Weaknesses
Strengths of your organization. What can help you achieve your objectives?	*Weaknesses of your organization. What might hinder your ability to reach your objectives?*
Opportunities	**Threats**
External factors that may help you reach your objectives.	*External factors that may negatively affect your ability to achieve your objectives.*

COMMUNICATIONS GOALS

- *This could be what you want people to do differently, desired behaviour changes etc.*
- *Long-term and should support organizational goals*
- *E.g.*
  o *Key audiences are aware that Foundry is coming and understand what Foundry centre will offer;*
  o *Foundry's brand is recognizable throughout the community;*

COMMUNICATION OBJECTIVES

- *Objectives should be SMART (strategic/specific, measurable, achievable, realistic, time-bound)*
- *Objectives are short-term steps to achieve your communication goals. It may be easiest to divide into short-term (e.g.: before centre launch) and long-term (e.g.: post centre launch).*
- *E.g.:*
  o *Raise $X and gain # new donors by [date]*
  o *Engage # new youth and families in a Foundry planning committee by [date]*
  o *Sign # new contacts up for email updates by [date]*
  o *Identify # new potential community partners and champions by [date]*

Communication Goal 1	
Objective 1:	
Objective 2:	
Objective 3:	

Align objectives with communication goals

PRIMARY AUDIENCES

Audience 1: *Who are you trying to reach (avoid using "general public")*

Desired Action: *What do you want them to do?*

Key Messages: *What do they need to know? How do you make the message resonate with this specific audience? Try to frame messages from your audiences' values. Messages can be persuasive or informative.*

Audience 2:

Desired Action:

Key Messages:

Audience 3:

Desired Action:

Key Messages:

COMMUNICATION CHANNELS

These are channels through which you can reach your audiences. These can be people, places or things.
Examples:
People: peers, respected authority figures,
Places: Schools, community centres, coffee shops, counselling offices, libraries
Things: Social media, website, news media, e-mail

TOOLS/TACTICS:

These are the events, activities and materials used to deliver messages through your chosen channels.
Examples:

- Community events	*- Newsletter*	*- Info booth/display table*
- Open house	*- Direct mail*	*- Billboards/advertising*
- Press conference	*- PSA*	*- Infographics*
- Meetings	*- Posters, flyers, brochures*	*- Building on existing events*
- Presentations	*- Press release*	*- Site tours*

AUDIENCE STRATEGIES
Fill out for each audience:

Audience:	
Messages:	
Channels:	
Tools & Tactics:	

KEY DATES/MILESTONES:
Key dates or important milestones to consider. These could be opportunities to leverage.

Examples:
- Local announcement of funding
- Major Foundry provincial announcements and/or campaigns
- Donor announcements/events
- Site opening
- Site one-year anniversary

IMPLEMENTATION
Build out an implementation plan using a similar template as below, this can be embedded in this document or attached as a separate, living document.

Date	Task	Person responsible	Budget	Resources needed	Status

MONITORING:
How will you track your progress? When will you monitor? How often?

EVALUATION:

How will you measure success? What does success look like? When will you evaluate?

Centre Opening Media Event Planning Template

PURPOSE OF DOCUMENT:

This is to help plan for a local media event to announce the centre opening. This is done in partnership with representatives from the Foundry central office, local Foundry centre and lead agency and Ministry of Mental Health & Addictions communications.

EVENT OVERVIEW:

The purpose of this event is to formally announce the opening of the centre. This generally includes a media announcement and may also involve tours of the centre, open house or local celebrations. The format of these events will vary depending on the community, but in general, they have included a formal media event with the provincial government (usually Ministry of Mental Health & Addictions), and involve different representation Foundry's central office and the local lead agency, youth and families.

EXAMPLE FORMAT:

- Media announcement with formal remarks from representatives (about 20-30 minutes)
- Q&A for media – usually only involving government and Foundry representatives (not youth/family)
- Media tour and interviews (interviews can include others outside of the formal remarks)
- Guest event and tours (e.g. open house, festival, donor event etc)

PLANNING TEAM:

The main organizing team includes:

- Communications Lead from Foundry's central office
- Lead agency representative
- MMHA communications contact
- Health authority contact

Each organization may have more than one person involved depending on the size and scope. For example, if there's a larger community event, the local youth advisory group may be involved with planning and organizing.

ACTION PLAN:

Note: The following is to be used as a guideline and is loosely based on previous events and may change in the future. Date/timing is just an estimate to begin planning. Timeline will depend on many variables (such as date lockdown) and will need to be adjusted accordingly.

Date/Timing	Action	Tools	Responsible	Linkages/considerations
Approx 2-3 months prior	Identify potential dates/date range for announcement		Lead agency with Foundry central office	Centre should identify soft opening time range with this announcement to follow. Specific services need to be in place (peer support, walk-in hours etc.)
Approx 2-3 months prior	Discuss potential event format with fundraising partner, YAC, family group, leadership table etc.		Lead agency	Things to determine: - In addition to a media announcement will there be a linked activity or event? Examples: community festival, open house, private donor event, pancake breakfast, youth performance - Will these events occur same day, following media event, or another day?
Approx 2 months prior	Submit draft event plan to Ministry communications to begin locking down dates	Event plan template	Foundry central office – Communications lead	
1-2 months prior	Begin drafting invite list	Invite list template	Comms lead as point person;	Lead agency to provide their list, Foundry central to add, HA and MMHA will add theirs. Final list to be submitted to Ministry comms
1-2 months prior	Begin identifying potential speakers, presenter for Indigenous welcome, and media interviews		Lead agency	Planning can start on this, and can be confirmed once date is solidified. It is nice to have a few other people (esp. youth and/or family members who are willing to be interviewed).

Date/Timing	Action	Tools	Responsible	Linkages/considerations
1-2 months prior	Community event planning (if applicable)		Lead agency	- Planning may depend on solidifying media event date; - consider capacity of team as there will be a lot of work underway in centre during soft launch; - ensure partner, youth & family engagement in planning; - This process would run concurrently with planning for the media announcement with one person being on both planning groups to ensure alignment
4-6 weeks prior	Develop key messaging, background information and press release	Key messaging document; press release; FAQ	Usually led by MMHA comms, Foundry Comms Lead as main point of contact, with lead agency to review and provide input.	- Consider specific messages to the centre (e.g. does the public need to know that only certain services will be offered?), potential issues that might come up etc. - Press release will usually include quotes from: MMHA, Foundry central leadership, lead agency leadership, health authority, youth or family
4-6 weeks prior	Develop local materials if appropriate	Brochures, banners, information sheets	Lead agency, with communication support from Foundry central	Lead agency to work with Foundry's Communication Lead and Coordinator to determine if any materials are needed for the day – especially if there is a larger event. May also want to check with fundraising leads.
4 weeks prior	Planning meeting called by MMHA comms		Usually led by MMHA comms and involves Foundry central office comms lead, lead agency rep, and health authority rep	Topics covered usually included: venue, set-up logistics, invitations, program, speakers, podium sign, media and photography.

Date/Timing	Action	Tools	Responsible	Linkages/considerations
4 weeks prior	Confirm event speakers and media interviews		MMHA determines gov't representation; Foundry comms lead determines Foundry speaker, lead agency determines lead agency representation and youth/family rep and Indigenous welcome	
4 weeks prior	Determine venue location, speaker pre-brief room and any visuals needed	Photos of space, measurements, pop-up banners, displays etc	Lead agency	Lead agency to provide photos and measurements of space to Ministry to determine best set-up (or coordinate walk-through if possible). Foundry central can help with banners etc.
2-4 weeks prior	Determine podium sign, A/V set-up, podium etc		Usually coordinated through MMHA with HA support	
2 weeks prior	Prepare speakers and potential interviews	Speaking notes, messaging, agenda, photo consent forms	Lead agency with support from Foundry's comms lead	Provide length of speaking time, guidance around remarks (avoid duplication with other speakers), obtain photo consent forms (may include one for Foundry, lead agency and Ministry if under age 19).
2 weeks prior	Media black out		Lead agency	During this time any media inquiries are put on hold until the event. Lead agencies can reach out to comms lead for support if they do receive inquiries and would like guidance with navigating them.
1-2 weeks prior	Finalize guest list		MMHA	Depending on space availability invite list may need to be adjusted accordingly

Date/Timing	Action	Tools	Responsible	Linkages/considerations
1-2 weeks prior	Speaking notes finalized	Speaking notes for all speakers	MMHA – Minister/gov't reps; Foundry Comms Lead – Foundry leadership notes and support for local speakers; Lead agency – lead agency speaking notes & support for local speakers	Communications lead will usually review all speaking notes for accuracy and to help avoid redundancy/duplication between speakers. Lead agency will usually support the local speakers as they have an established relationship, but Comms lead is also available for assistance.
1-2 weeks prior	Arrange for photographer		Lead agency	Sometimes MMHA arranges a photographer, but lead agencies are also encouraged to make arrangements to ensure desired images are captured
1-2 weeks prior	Determine media interviews and tour guides for event		Lead agency, with Comms Lead	Usually people speaking as part of the formal program will be asked to do media interviews afterwards. It is good to have others lined up as well (e.g. peer support workers, family, clinicians). Usually tour is led by the lead agency rep and Foundry's ED and can involve other centre staff if they are comfortable answering questions for their area. Be sure to have signed media consent forms for those doing interviews, especially underage, or non-staff. Youth/family members may find a briefing helpful to prepare.
About 1 week prior	Brief staff on timing and logistics and any further impact to centre operations		Lead agency	Provide staff with an overview of the agenda, logistics, instructions around media, and messaging in case they are asked questions (especially front desk).

Date/Timing	Action	Tools	Responsible	Linkages/considerations
About 1 week prior	Save the date for key stakeholders		Lead agency	Ministry will send out the invite a few days before, but a general "save the date" with basic info (time/location) may be needed for key stakeholders (e.g. donors) to give proper notice. Lead agency to discuss with Comms Lead before sending.
A few days prior	Create media notice posters		Lead agency	For entrance and other appropriate space, it is suggested to put up a notice a day before that a media event will be held and filming/photography will occur. Comms Lead can provide an example template if requested.
Day before	Venue set-up		Lead agency	If possible, clear out room night before to prepare for set-up; post event/media notice posters
Morning of event	Venue set-up	Podium, mic, A/V, banners, podium sign, media notice posters	Lead agency and Ministry/HA leads	Lead agency rep to meet Ministry or health authority rep to set up venue. Ministry/HA usually handle media location, podium, A/V, mics etc. Lead agency usually handles banners, displays, seating, water etc.
Day of event	Greet media		Ministry lead, or Foundry Comms lead	TBD who will be the media point person. Be sure to give media quick run of the event and get the reporter's name and media outlet. This person may also lead the Q&A scrum (usually only for Ministry and Foundry leadership – not youth and family). This person will also give instructions for tour and support one-on-one interviews.

Date/Timing	Action	Tools	Responsible	Linkages/considerations
Day of event	Greet speakers and guests		Lead agency	When speakers are identified ask them to meet in the briefing room before the event and give them the time and location.
Day of event	Distribution of press release		Ministry comms (or Foundry comms)	Printed copies to be distributed at event to media in attendance
15 minutes before start	Speaker pre-brief		Ministry/HA lead, or Foundry Comms Lead	Quick run-down of program with speakers prior to start.
After formal speaking & Q&A	Media tour & interviews		Ministry/HA lead, lead agency, Foundry Comms Lead	Distribute people as required. If youth/families are being interviewed a lead agency/Foundry rep should also be in attendance to support them (and collect media consent if needed).
Post-event	Media monitoring	Media clippings	Foundry communications coordinator	Distribute to lead agency and other channels as appropriate
Post-event	debrief		Foundry comms and lead agency	Quick call to go over event and identify opportunity for improvements, etc.

Foundry Ridge Meadows Communications Plan

PURPOSE OF THIS DOCUMENT

This document is intended to outline Foundry Ridge Meadows' strategic communications plan. A communications plan is considered a "living" document and should be continuously updated and adjusted as new information is available.

OVERVIEW

The Youth Wellness Centre located in Maple Ridge will be transitioning to Foundry Ridge Meadows in late 2019. This plan outlines strategies and tactics to communicate the transition to existing and potential clients and their families.

COMMUNICATIONS GOALS

- *Existing and potential clients know that:*
    - o *The Youth Wellness Centre (YWC) will transition into Foundry Ridge Meadows in late 2019.*
    - o *The Youth Wellness Centre's current location will undergo renovations as it gets ready to open as Foundry. During renovations, the YWC will move to a temporary location and and provide scaled back services.*
    - o *Foundry focuses on early intervention, bringing mental health, substance use, peer support, primary care and social services together in a single place. Foundry makes it easier for young people aged 12-24 to find the care, connection and support they need.*
- *Existing clients aged 8-11 and their family understand that once the Youth Wellness Centre transitions into Foundry Ridge Meadows, which only provides services for youth 12-24, they will be supported through an alternative care model.*
- *Youth ages 8-11 interested in receiving care/support understand where to go.*

COMMUNICATION OBJECTIVES AND TACTICS

- *Objectives should be SMART (strategic/specific, measurable, achievable, realistic, time-bound)*
- *Objectives are short-term steps to achieve your communication goals. It may be easiest to divide into short-term (e.g.: before centre launch) and long-term (e.g.: post centre launch).*
- *E.g.:*
    - o *Raise $X and gain # new donors by [date] through Twitter campaign*
    - o *Engage # new youth and families in a Foundry planning committee by [date] by leveraging our email newsletter*

Communication Goal 1	- *Existing and potential clients know that:*
	   o *The Youth Wellness Centre (YWC) will transition into Foundry Ridge Meadows in late 2019.*
	   o *The Youth Wellness Centre's current location will undergo renovations as it gets ready to open as Foundry. During renovations, the YWC will move to a temporary location and scale back services.*
	   o *Foundry focuses on early intervention, bringing mental health, substance use, peer support, primary care and social services together in a single place. Foundry makes it easier for young people aged 12-24 to find the care, connection and support they need.*

Objective/Tactic 1:	
Objective/Tactic 2:	
Communication Goal 2	- *Existing clients aged 8-11 and their family understand that once the Youth Wellness Centre transitions into Foundry Ridge Meadows, which only provides services for youth 12-24, they will be supported through an alternative care model.*

Objective/Tactic 1:	*Tactics can include:*
	   o *Social media channels*
	   o *DoFP email newsletter – to communicate to physicians*
	   o *Youth and family groups*
	   o *MOAs*
	   o *Schools/school counsellors*
	   o *Local newspaper?*

Communication Goal 3	- *Youth ages 8-11 interested in receiving care/support understand where to go.*
Objective/Tactic 1:	

PRIMARY AUDIENCES

Audience 1: *Existing and potential clients (youth ages 12-24) and their families.*

Desired Action: *Understand that the Youth Wellness Centre is transitioning to Foundry and will be moving to a temporary location in the summer. Receive answers to all their questions relating to the transition and move.*

Key Messages:

What's happening?

The Youth Wellness Centre will transition into Foundry Ridge Meadows in late 2019.

Who is Foundry?

Foundry is forging a new, province-wide culture of care through the development of a network of centres and foundrybc.ca. Foundry focuses on early intervention, bringing mental health, substance use, peer support, primary care and social services together in a single place. Foundry makes it easier for young people aged 12-24 to find the care, connection and support they need.

What do you need to know?

The Youth Wellness Centre's current location will undergo renovations as it gets ready to open as Foundry. During renovations, the Youth Wellness Centre will move to a temporary location and provide scaled back services.

When will Foundry open?

We're aiming to have Foundry Ridge Meadows open in late 2019; connect with us via social media [add handles here] and keep an eye on your local news for the official opening announcement\. Once Foundry Ridge Meadows is open, we hope you can drop by to say hi and spread the word!

Audience 2: *Existing clients aged 8-11 and their family*

Desired Action: *Understand and feel reassured that once the Youth Wellness Centre transitions into Foundry Ridge Meadows, which only provides services for youth 12-24, they will be supported through an alternative care model.*

Key Messages:

Audience 3: *Youth ages 8-11 interested in receiving care/support*

Desired Action: *Understand where to go to receive care/support.*

Key Messages:

KEY DATES/MILESTONES:

Key dates or important milestones to consider. These could be opportunities to leverage.

Examples:
- Local announcement of funding
- Major Foundry provincial announcements and/or campaigns
- Donor announcements/events
- Site opening
- Site one-year anniversary

IMPLEMENTATION

Build out an implementation plan using a similar template as below, this can be embedded in this document or attached as a separate, living document.

Date	Task	Person responsible	Budget	Resources needed	Status

MONITORING:

How will you track your progress? When will you monitor? How often?

EVALUATION:

How will you measure success? What does success look like? When will you evaluate?

The Youth Wellness Centre is becoming Foundry Ridge Meadows!

We're pleased to announce that more integrated health and social services for young people 12-24 are coming to Ridge Meadows! The Youth Wellness Centre (YWC) is becoming Foundry Ridge Meadows in an effort to provide mental health and substance use support, peer support, physical health and social services from a single place.

Foundry Ridge Meadows' anticipated soft opening is on Wednesday, January 22, 2020 at #2 – 22932 Lougheed Hwy from 1-6pm.

What is Foundry Ridge Meadows?

Foundry Ridge Meadows is a place where young people 12-24 can access mental health and substance use support, physical health, peer support, and social services. Foundry makes it easy for young people and their families to find the care, connection and support they are seeking. Learn more: foundrybc.ca/ridgemeadows
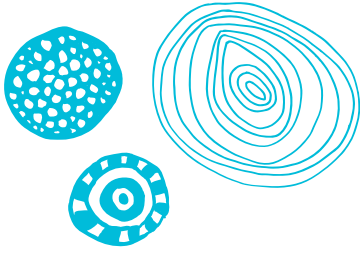
What do I need to know?

As the YWC becomes Foundry Ridge Meadows, it will be moving from Golden Ears Family Practice to the YWC's original location at #2 – 22932 Lougheed Hwy.

When	Present - Dec. 22, 2019	Dec. 23-31, 2019	Jan. 1-21, 2020	Jan. 22, 2020	Coming Soon!
What	The Youth Wellness Centre will be providing regular service. See schedule at youthwellness.ca	The Youth Wellness Centre will be closed for the holidays.	The Youth Wellness Centre will be closed. YWC will be busy moving and getting ready to open as Foundry Ridge Meadows.	Foundry Ridge Meadows will be open on **Tuesdays, Wednesdays, and Thursdays from 1-6pm** and will be offering counselling, peer support, substance use support and sexual health support. Schedule will be up on foundrybc.ca/ridge-meadows in January 2020!	Stay tuned; Foundry Ridge Meadows will be offering more services and will be open more days in the near future! Follow us on: ❘❘ @FoundryRidgeMeadows ⬤ @FoundryRidgeMeadows ❘ @FoundryRidge or keep an eye on foundrybc.ca/ridgemead-ows
Where	Golden Ears Family Practice, 20395 Lougheed Hwy	Golden Ears Family Practice, 20395 Lougheed Hwy	Foundry Ridge Meadows, #2 – 22932 Lougheed Hwy	Foundry Ridge Meadows, #2 – 22932 Lougheed Hwy	Foundry Ridge Meadows, #2 – 22932 Lougheed Hwy

Frequently Asked Questions (FAQs):

1. **Why is the Youth Wellness Centre transitioning to Foundry Ridge Meadows?**
   The Youth Wellness Centre is transitioning to Foundry Ridge Meadows in an effort to offer more services (mental health and substance use support, peer support, social services, and physical health from a single place.

2. **How will Foundry Ridge Meadows be different from the Youth Wellness Centre?**
   Transitioning to Foundry will increase the number of health and social services available in our community, as well as enable young people 12-24 and their families to access a bigger integrated team that will offer support and wraparound care.

3. **What happens to my Youth Wellness Centre appointments?**
   All appointments scheduled in December will remain the same.

4. **Will my Youth Wellness Centre client file transition over to Foundry Ridge Meadows?**
   Yes, your file will transition over so you won't have to start from the beginning when you come to Foundry Ridge Meadows.

5. **Will my client file be shared with new service providers at Foundry Ridge Meadows?**
   Your file will not be shared without your permission. We will be sure go over all the details with you; we'll be following a similar process to when you first came into the Youth Wellness Centre.

6. **Will I be able to see the same service provider(s) at Foundry Ridge Meadows?**
   We are excited to have our Youth Wellness Centre team transition and have our team grow! So the short answer is yes, and we hope to introduce new team members to you as well!

Capital Development

G.1 Template: Project Schedule

G.2 Template: SWOT Site Selection Worksheet (5 pages)

G.3 Example: Functional Program (available upon request from FCO)

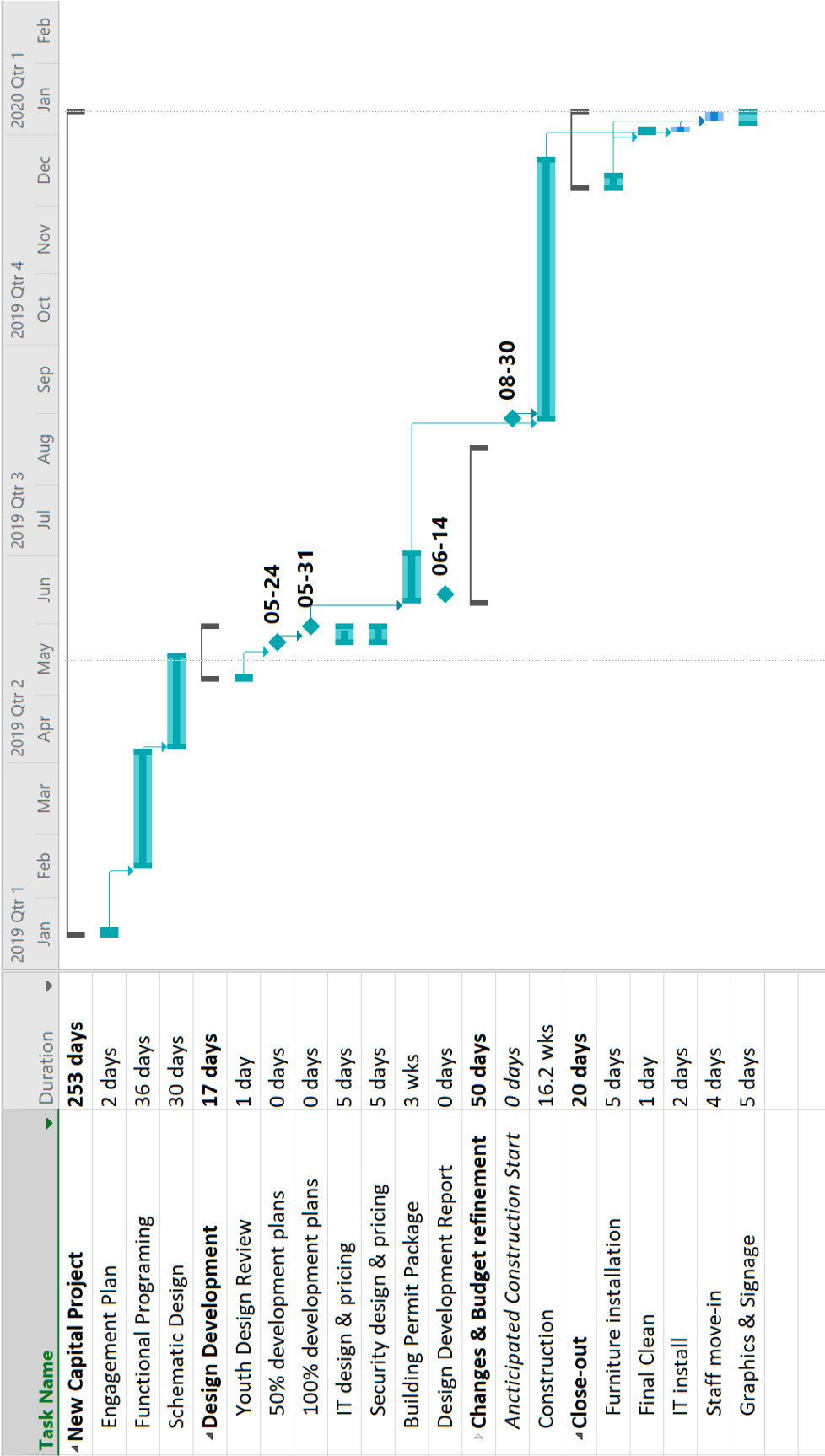**G.4** Example: Schematic Design (available upon request from FCO)

G.5 Template: Capital Budget*

*Available as Microsoft Excel file.

Template: Project Schedule

Task Name	Duration
New Capital Project	**253 days**
Engagement Plan	2 days
Functional Programing	36 days
Schematic Design	30 days
Design Development	**17 days**
Youth Design Review	1 day
50% development plans	0 days
100% development plans	0 days
IT design & pricing	5 days
Security design & pricing	5 days
Building Permit Package	3 wks
Design Development Report	0 days
Changes & Budget refinement	**50 days**
Anticipated Construction Start	*0 days*
Construction	16.2 wks
Close-out	**20 days**
Furniture installation	5 days
Final Clean	1 day
IT install	2 days
Staff move-in	4 days
Graphics & Signage	5 days

SWOT Site Selection Worksheet

The primary source of criteria to use in identifying and selecting a location for a new Foundry centre should be the service and functional program plans that the lead agency develops with stakeholders. Consult with your young people and families. This worksheet is not a substitute for knowing your community and your functional requirements; it is merely a tool to help you compare your real-estate options systematically.

SWOT Analysis for a candidate location

STRENGTHS:

1. Cost: is there a financial incentive for choosing this location? (consider $/sqft)
2. Central location: is it located near the downtown core of your community?
    a. Visible, easy to find.
    b. Close to schools.
    c. Close to residential neighbourhoods where youth live.
3. Transit: is it immediately accessible by a bus stop or other public transit link? Multiple?
4. Storefront: is the location ground level, highly visible and easy to find?
   Second floor and underground locations are less desirable.
5. Zoning: has the municipal government zoned this location for healthcare, social services?
   Applying for a variance is less desirable.
6. Landlord: reputable private landlord, government, or community partner.
7. Neighbourhood:
    a. Food options, coffee shops.
    b. Appropriate kinds of retail.
    c. Clean, safe public spaces.

Item	Comments	Weight

WEAKNESSES:

1. Small: the location is 7,000 square feet or less.
2. Expensive: estimated rent + triple-net is above 10% of operating budget.
3. Remote: not downtown, long travel distances.
4. Transit: few to no transit stops nearby, not on a major route.
5. Inaccessible: identified barriers to access, hard to find, youth are unlikely to know the route or neighbourhood, and/or other reasons clients may not want to travel here.
6. Above/below ground level.
7. Exterior sign options limited by permit restrictions or building fascia.
8. Lack of elevator for upper/lower storey access (if applicable).
9. Run-down: needs more capital improvements than we may be able or willing to provide.
10. Neighbourhood: undesirable/inappropriate businesses or other neighbours.
11. Noise: Industrial neighbours? Martial arts or fitness studio? Train tracks?

Item	Comments	Weight

FOUNDRY
WHERE WELLNESS TAKES SHAPE

OPPORTUNITIES:

1. Community partners proximal: existing or potential new.
2. Room to grow: the site could be expanded in future.
3. Room to rent: the site could be subdivided and sub-leased for cost recovery.
4. Community outlook: this location has potential future benefits.

Item	Comments	Weight

THREATS:

1. Neighbourhood:
   a. Is the location potentially unsafe? Conduct a hazard assessment.
   b. Is the neighbourhood of ill repute (crime?)
   c. Is the neighbourhood run down? (abandoned buildings?)
   d. Not In My Back Yard: community resistance to a Foundry centre in this location?
   e. Does the municipality's Community Plan for this neighbourhood have undesirable future changes slated? Is major redevelopment planned or proposed? Is your location potentially to be demolished to make room for park in future years? Change of zoning at this location or neighbouring?
2. Landlord: less-desirable for any reason? Consider the condition of other real-estate in this person or business's portfolio: are they run down? Pending lawsuits? Bad reviews? History with your organization or partners? Is it a real-estate investment trust (REIT) with an obligation to maximize returns?

Item	Comments	Weight

Weigh your SWOT data

Strengths	
Weaknesses	
Opportunities	
Threats	
Score	

Example: Functional Program

A Functional Program is described in the *CSA standard Z-8000: Canadian Health Care Facilities* as "a planning document that defines the desired outcome for a building project, informing both operating and capital cost estimates and providing the functional and spatial specifications that provide the primary guide for the subsequent architectural design of a building."

The creation of the functional program is normally led by a professional interior designer or the architect of the project."

An example of a Functional Program is available upon request from FCO.

FCO Support

Robert McRudden
Project Manager, Capital Projects
Foundry Central Office
rmcrudden@foundrybc.ca

Example: Schematic Design

The design package for a centre includes the construction drawings for municipal permits and for tendering proposals for construction services. The project team reviews drafts of the schematic design with the service implementation team before bringing a final draft to the wider stakeholder audience for feedback. Once a design is approved, it may go to tender through a typical RFP process unless another process has been approved.

A review of proposals may lead to changes to the budget and/or schematic design if early cost estimates are found to be significantly erroneous. It is of critical importance to have reasonable certainty that the design meets all requirements and can be produced on-time and within budget before executing the project. Changes are expensive while a capital budget of donated funds is inflexible.

When the final schematic design, budget, and schedule are complete and signed-off, the construction contract can be awarded, and the design may be presented to the general public through a town-hall event for community stakeholders and donors.

An example of a Schematic Design is available upon request from FCO.

FCO Support

Robert McRudden
Project Manager, Capital Projects
Foundry Central Office
rmcrudden@foundrybc.ca

Foundry Centre Capital Budget - Sample

Sample high-level budget based on a leased building and tenant improvement approx 6,000 sqft

Budget Item Description	Budget
Construction Costs	**1,220,000.00**
General Construction Costs	1,000,000
Additional Construction Contingency	150,000
IT Costs PHC Data Drops	70,000
Professional Fees	**100,000**
Architect	6,000
Structural Engineer	3,000
Mechanical Engineer	10,000
Electrical Engineer	10,000
Interior Designer	70,000
Interior Designer Reimbursables	1,000
Other Costs	**10,000**
Owner's Insurance	10,000
Equipment and Furnishings	**157,500**
Equipment	15,000
Furnishings	140,000
Signage	2,500
Taxes	**37,188**
GST (5%)	74,375
GST Rebate (approx 50% Recovery)	-37,188
	1,524,688
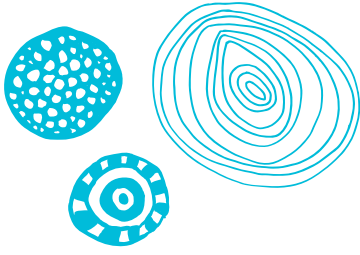
Philanthropy and Fundraising

Prospect Management Practice Guidelines

Foundry

Item	Prospect Management Practice Guidelines
Date created	September 2016 (new version currently under development)
Created by	Principal, Fund Development, Foundry
Reviewed by	Executive Director, Foundry Director, Policy and Partnerships, Foundry Graham Boeckh Foundation President & CEO, St. Paul's Foundation Chief Development Officer, St. Paul's Foundation Campaign Director, St. Paul's Foundation Foundry Lead Agencies: John Howard Society of North Island, Kelowna CMHA, Abbotsford Community Services, Vancouver Coastal Health, and YMCA of Northern BC
Also see	Foundry Donor Recognition Practice Guidelines Appendix #1: Flow of Funds
Revised	December 2016 (to reflect new brand) February 2017 (to reflect change in Governing Council membership)

I.   INTRODUCTION:

The purpose of these Prospect Management Practice Guidelines is to optimize Foundry's resource development activities by ensuring that interactions with funders, including donors and government agencies, are as coordinated and strategic as possible. Our coordinated efforts will allow Foundry, our partners and our sites to benefit from the work of the whole. In doing so, we will maximize our ability achieve our shared vision of improving access to mental health, substance use and primary care for young people across BC.

By contrast, a series of uncoordinated solicitations to one funder by different organizations involved in Foundry may undermine our collective fundraising efforts and hinder us from achieving our shared vision.

II.   DEFINITIONS:

For the purposes of this document, the following definitions apply:

- **Foundry Central Office (FCO)**: Foundry's Central Office team, located in Vancouver (formerly referred to as the BC Integrated Youth Services Initiative Backbone Organization).
- **Lead Agency:** the lead agency hosting the local Foundry centre.
- **Agency Fundraising Organization (AFO):** an organization that partners with a Lead Agency to raise funds for their Foundry centre, such as a local community association or foundation.

- **Donation**: a single-payment financial gift or grant, cumulative annual or lifetime giving, a written pledge to be paid over time, or a documented planned gift.
- **Funder**: any person, organization or government agency who may be asked for, or has made, a Donation to Foundry through the FCO or any Partners.
- **Fundraising:** any activities conducted with the purpose of securing Donations for Foundry.
- **Partners**: refers collectively to all organizations involved in Fundraising for any aspect of Foundry. This includes, but is not limited to, the parties to the Collaboration Agreement signed October 2015, Lead Agencies, and AFOs.

III.   PRINCIPLES:

These practice guidelines are designed to ensure any Fundraising for Foundry, conducted by Foundry and its Partners:

- Reflects, and helps to advance, Foundry's vision, mission and values;
- Creates opportunities for resource development and growth;
- Is coordinated and therefore, minimizes Funder confusion;
- Prevents tension amongst Partners;
- Honours Funder privacy; and
- Is as fair and equitable as possible.

All Fundraising activities for Foundry must be carried out in accordance with the ethics and principles set out by Imagine Canada or the Association of Fundraising Professionals, or a similarly recognized set of standards.

IV.   NOTES:

The FCO understands and acknowledges that its Partners may each have their own Prospect Management Policies in place, and that they may vary. If anything outlined in this document does <u>not</u> support a Partner's Fundraising needs, the Partner is invited to contact the FCO with their feedback.

V.   JURISDICTION:

These practice guidelines apply to all people and organizations Fundraising to support Foundry, including for the FCO, local centres, or e-health.

VI.   GENERAL:

1. Fundraising for Foundry will require frequent communication, trust and collegiality between Partners.

2. Funder privacy should remain paramount. The need to maintain Funder privacy will, at times, constrain what information can be shared between Partners and the FCO. This may lead to misunderstandings with Funders, or conflict between Partners. The FCO encourages Partners to update the Principal, Fund Development as soon as any concerns arise so mitigation strategies can be identified as quickly as possible.

3. These practice guidelines may change from time to time.

   VII.   ROLES AND RESPONSIBILITIES:

1. The Principal, Fund Development will be the FCO point person for prospect management and coordination amongst the FCO and its Partners.

2. Lead Agencies and AFO's will be responsible for prospect management at the local level, i.e. to ensure a coordinated approach within their own communities, and that communication flows, as needed, between all local Partners.

3. Stewardship and recognition of confirmed Funders is the responsibility of the Partner securing and receiving the gift (see Foundry Donor Recognition Practice Guidelines).

   VIII.   PROCEDURES:

1. The Principal, Fund Development at the FCO will call or meet regularly with a designated Fundraising representative from each Partner to offer support with prospect management and other Fundraising needs.

2. Partners will consult with the FCO in advance of approaching a Funder regarding Foundry, whenever any <u>one</u> of the following criteria apply:

   a. The Funder is a provincial or national government agency or body;
   b. The Funder supports organizations outside of a limited local area (e.g. a community foundation vs. a national bank);
   c. The Funder has a head office or a substantial base of operations outside of the Partner's Health Authority or within another Partner's local area;
   d. The Funder is already publicly listed as a Funder to Foundry or to another Partner; or
   e. The proposal will be for any part of Foundry outside of the Partner's scope or authority (e.g. a site not under a Partner's sole jurisdiction, specific operations of the FCO, or future plans for Foundry not yet confirmed).

3. The Principal, Fund Development may also refer a Funder to a Partner if that Funder has interest in a specific site or in working with a particular Partner.

4. The Principal, Fund Development will maintain a list of Funders and their associated Partners and, if there appears to be a conflict (e.g. more than one Partner approaching the same Funder), will contact relevant Partners to discuss next steps.

   a. Factors for discussion may include:
      i. Which Partner is best positioned to maximize the opportunity;
      ii. A Funder's desire to work with a specific Partner; or
      iii. A Funder's existing relationship with a Partner, such as a volunteer, director, past donor, or personal friend.

   b. If agreement is reached, and next steps include one Partner approaching the Funder, the assigned Partner should attempt to engage the Funder within three months. If this does not occur, the Partner should update the FCO and recommend a revised strategy or next steps.

   c. If agreement cannot be reached, the FCO will gather information from each Partner and assess, as collaboratively as possible with them, whether 1) a joint approach can be made, 2) a certain Partner may have the best chance of success, or 3) it would be more effective for the FCO, as a neutral party, to approach the Funder directly.

      i. If a disagreement occurs, the FCO will prompt a discussion between affected Partners.

      ii. If the disagreement cannot be resolved between Partners, it will be elevated to the Executive Director of Foundry, who may elect to raise the issue with the following foundations party to the Foundry (BC-IYSI) Collaboration Agreement signed October 2015: Graham Boeckh Foundation and St. Paul's Foundation.

      iii. If the disagreement cannot be resolved upon consultation with the Graham Boeckh Foundation and St. Paul's Foundation, the Executive Director Foundry may raise the issue with the Foundry Governing Council for final resolution. This option should be reserved for extraordinary circumstances and considered a last resort.

      iv. The Principal, Fund Development will communicate any resolution to relevant Partners, along with rationale, where not constrained by Funder privacy.

   d. If a Partner violates an agreement or decision, a meeting (in-person or teleconference) will be called between the affected Partners, the Principal, Fund Development, and, as needed, the Executive Director of the FCO and members of the Foundry Governing Council, to 1) talk through the issue, 2) determine how to resolve it, 3) determine how and avoid a similar issue in future, and 4) discuss how to re-establish trust between affected Partners.

5. Once a Donation of over $10,000 has been confirmed or received, Partners are requested to 1) ask permission from the Funder to inform the FCO of their Donations, and 2) when permission is granted, to inform the Principal, Fund Development.

Unless otherwise discussed between the Partner and the FCO, the FCO will use this information only 1) for prospect management purposes, 2) for Funder recognition purposes, or 3) if permission is granted, for other Funder relations, including communications, purposes.

CONTACT:
Questions and feedback are welcomed. Please direct to:

Communications and Development Lead
Foundry Central Office

Appendix #1: Flow and Designation of Funds

Note: As part of their fundraising commitments, St. Paul's Foundation may solicit donors for defined aspects of the project; such as its FCO functions or portions of capital grants for specific sites. In such cases, prospect management becomes even more critical. Good prospect management it ensures all Partners are positioned for success and avoids donor confusion and duplication of asks.

Should St. Paul's Foundation wish to solicit a Donor for a specific FCO function or Foundry site, they are encouraged to speak with the FCO as early as possible. If the solicitation will be for a specific site, the FCO will coordinate a discussion with the Lead Agency(ies). It is recommended that such discussions occur before any proposal is presented, to ensure alignment with local relationships and any relevant Lead Agency policies.

Gift Acceptance Practice Guidelines

Foundry (formerly BC Integrated Youth Services Initiative)

Policy	Gift Acceptance Policy
Date	April 2016 (new version currently under development)
Created by	Principal, Fund Development, Foundry
Also see	Foundry Gift Acceptance Policy
	Foundry Donor Recognition Policy
Revised	February 2017, to reflect new brand

INTRODUCTION:

The purpose of this Gift Acceptance Policy is to optimize Foundry's fundraising efforts by ensuring that all donations it receives contribute to its brand and reputation – and therefore complement its vision of improving access to mental health, substance use and primary care for youth and young adults across BC.

PRINCIPLES:

This policy is designed to ensure all donations to the Foundry, through the Foundry Central Office or its partners:

• Reflect, and help to advance, the Foundry vision, mission and values;
• Support opportunities for future resource development and growth;
• Align with and support the priorities of the Foundry or its partners;
• Cultivate a culture of philanthropy within and amongst communities impacted by Foundry.

All fundraising activities for Foundry must be carried out in accordance with the ethics and principles set out by Imagine Canada or the Association of Fundraising Professionals, or a similarly recognized set of standards.

DEFINITIONS:

For the purposes of this document, the following definitions will apply:

• **FCO**: the Foundry Central Office.

• **Partners**: refers collectively to all organizations involved in fundraising for any aspect of the Foundry. This includes, but is not limited to, the parties to the Collaboration Agreement signed October 2015, lead agencies hosting local Foundry centres, and any organization working with lead agencies to raise funds for local centres.

• **Donation**: a single-payment gift, cumulative annual or lifetime giving, a written pledge to be paid over time, a gift-in-kind, or a documented planned gift.

- **Donor**: person or organization who may be asked for, or has made, a Donation to the Foundry through its FCO or its Partners (inclusive of prospects).

NOTES:

1. The FCO understands and acknowledges that its Partners may each have their own Gift Acceptance Policies in place, and that they may vary. If anything outlined in this document does <u>not</u> support a Partner's fundraising needs, the Partner is invited to contact the FCO to discuss potential solutions.

JURISDICTION:

This policy applies to all organizations fundraising to support Foundry, including for the FCO, local centres, or e-health. It applies only to those Donations received for the benefit of, or that are affiliated with, Foundry.

Donations received by the FCO will be directed to the Foundry Fund Manager, St. Paul's Foundation, and will therefore also be subject to their Gift Acceptance Policy.

ROLES AND RESPONSIBILITIES:

The FCO anticipates that Partners who are able to accept charitable Donations will 1) have their own Gift Acceptance Policies in Place, and 2) will comply with the Canada Revenue Agency and Income Tax Act with respect to acceptance of Donations and issuance of charitable receipts. The Principal, Fund Development is available for support as needed.

Foundry does not provide any legal, accounting, tax or financial advice to Donors with respect to Donations, and encourages Donors to seek independent legal, accounting, tax or financial advice from professionals. Donors are responsible for costs incurred by obtaining such advice.

GENERAL:

1. Donations received by Foundry and its FCO, or benefiting any of its local centres, must complement the Foundry mission, vision and values. Foundry reserves the right to refuse or dissociate itself from any Donation that may compromise its integrity. This may include Donations:

   a. From individuals or organizations whose philosophy and values are in direct conflict with the vision, mission or values of Foundry or an affected Partner;
   b. Which in any way violate federal, provincial or municipal laws or regulations;
   c. Which are considered to have come from illegal or unethical activities;
   d. Whose acceptance may damage the reputation of Foundry or one of its Partners;
   e. Which could improperly benefit any individual or organization;
   f. Where conditions imposed on the gift conflict with the policy, the overall objectives or independence of the Foundry or one of its Partners;
   g. Would require Foundry or any of its Partners to expend resources on activities that are not consistent with its priorities; and/or

h. Where acceptance or administration of a gift or payment will impose undue expense on Foundry or one of its Partners, or expose them to liability or embarrassment.

2. From time to time, the FCO or its Partners may be unsure whether acceptance of a particular Donation might conflict with the principles listed above (for example, proceeds of the sale of legal substances, such as alcohol or tobacco). In such cases, the FCO requests that the Partner consult with its Youth and Family Advisory Councils or other youth and family representatives, and local partners such as their Local Leadership Table. Partners are welcome to contact the FCO for support in such decision-making.

3. This policy may change from time to time.

PROCEDURES:

1. The FCO and its Partners are each individually responsible for implementing this policy throughout the course of their fundraising activities. Should any concerns arise about a Donor or Donation, they should notify the Principal, Fund Development at the FCO immediately, and prior to accepting such Donation.

2. The Executive Director of Foundry will review and assess all Donations that may negatively impact the brand or reputation of Foundry. They may choose to elevate a decision to the Foundry Governing Council.

3. If any Partner requires additional support, a request can be sent to the Principal, Fund Development at the FCO.

CONTACT:

Questions and feedback are welcomed. Please direct them to:

Communications and Development Lead
Foundry Central Office

Donor Recognition Practice Guidelines

Foundry

Item	Donor Recognition Practice Guidelines
Date	June 2016 (new version currently under development)
Created by	Principal, Fund Development, Foundry
Reviewed by	Executive Director, Foundry Director, Donor Relations, St. Paul's Foundation Director, Graham Boeckh Foundation Foundry Lead Agencies: Abbotsford Community Services, CMHA Kelowna, John Howard Society of North Island, Vancouver Coastal Health, and YMCA of Prince George (Granville Youth Health Centre captured by St. Paul's Foundation)
Also see	Foundry Prospect Management Practice Guidelines
Revised	January 2017 (to reflect Foundry brand) November 2017 (to include Foundry's online resources)

I. PURPOSE

The purpose of these Donor Recognition Practice Guidelines is to ensure Foundry's central office and its partners appropriately and equitably thank, recognize, and steward donors to Foundry and its centres. Our coordinated donor recognition efforts will ensure donors feel informed about, engaged with, and inspired by their giving; and may encourage them to make future donations. In doing so, it will maximize our ability to achieve Foundry's vision of improving access to mental health, substance use and primary care for youth and young adults across BC.

II. DEFINITIONS:

For the purposes of this document, the following definitions will apply:

- **FCO**: the Foundry central office.

- **Lead Agency:** the lead agency hosting a Foundry local centre.

- **Founders:** refers to one of the three original non-government parties to the Collaboration Agreement signed October 2015: St. Paul's Foundation, Graham Boeckh Foundation, and the Michael Smith Foundation for Health Research.

- **Agency Fundraising Organization (AFO):** an organization that partners with a Lead Agency to raise funds for their local Foundry centre; may include for example a hospital foundation or the local chapter of a national nonprofit.

- **Partners**: refers collectively to all organizations involved in fundraising for any aspect of Foundry. This includes, but is not limited to, Founders, Lead Agencies, and AFOs.

- **Donation**: a single-payment gift, cumulative annual or lifetime giving, a written pledge to be paid over time, or a documented planned gift. Typically refers to cash gifts, though extraordinary in-kind contributions may be considered.

- **Donor**: person or organization who has made a Donation to Foundry through its Partners.

- **Donor Recognition**: all Donor recognition types and vehicles, including naming of physical space, programs and positions; branding; communications including web-based; events; thank-you processes, etc.

- **Naming Recognition**: the naming of a physical space, object, program or other entity after a Donor (e.g. the John Smith Resource Room).

- **Signage Recognition**: includes listing of Donor Recognition wording (e.g. names) on a Donor wall or website, placement of a plaque or marker, or other vehicles that may involve a Donor's name, but are not Naming Recognition.

III. <u>PRINCIPLES</u>:

These Practice Guidelines have been designed to ensure Donor Recognition related to Foundry:

- reflects, and helps to advance, the Foundry vision, mission and values;
- is meaningful for Donors;
- advances relationships with Donors;
- creates opportunities for resource development and growth;
- is as consistent and as equitable as possible;
- aligns with and supports the overarching Foundry branding and communications strategy; and
- cultivates a culture of philanthropy within and amongst communities impacted by Foundry.

IV. <u>NOTE</u>:

1. The FCO understands and acknowledges that its Partners may each have their own Donor Recognition Policies in place, and that they may vary between organizations and communities. If anything outlined in this document does <u>not</u> support an organization's fundraising needs, the organization is invited to contact the FCO to jointly identify a solution.

V. <u>GENERAL</u>:

1. Due to the important role brand awareness will play in the success of Foundry, Naming Recognition is not available for the overall Foundry, nor for its local centres. It is available for spaces and activities that are part of the Foundry or its local centres.

   a. Spaces within facilities or activities supported by Donations may be named after a Donor, or a third party at the wish of a Donor, provided that the Donation represents a significant part of the cost or is regarded as central to the completion of the facility or activity.

      b. Naming associated with a particular space or activity will not preclude further naming opportunities within or related to that space or activity.

2. Foundry Central has established minimum Donation thresholds for Donor Recognition available through Foundry Central. Foundry Central will work with Lead Agencies to develop minimum Donation thresholds for their local centres. While some consistency is desired, these thresholds may vary between communities.

3. Donor Recognition may also be subject to:
      a. The Income Tax Act and Canada Revenue Agency guidelines;
      b. The Province of BC's Naming Privileges Policy; and/or
      c. Naming or Donor Recognition policies of Partners.

4. When Donor Recognition has been offered and approved, it will be honoured in accordance with the agreement that was entered into. In the event of changed circumstances, such as a renovation to a space, Foundry Central is available to consult, if needed, with the Donor and relevant Partners, to determine a suitable alternative.

5. Foundry Central and its Partners reserve the right to decline or revoke Donor Recognition if it has reasonable concern about impact to their brand or reputation.

6. Donors may choose their preferred recognition wording. They may use their own names, their business name, or may wish to celebrate a life or honour a loved one. (*For example: ABC Corporation; John and Jane Smith; In Honour of Jennifer Smith; or In Memory of Jason Smith.*)

7. To avoid the appearance of advertising, corporate logos will not be used for Donor Recognition purposes on buildings or signs, unless approved by the Executive Director of the FCO.

8. Consideration should always be given to the longevity of Naming or Signage Recognition: for example, for the life of a lease, the duration of a program, or to anticipate future fundraising needs. Except for in exceptional cases, Donor Recognition should not be promised in perpetuity. Limited-term recognition may be offered. At the expiration of the term, the Donor may be given the first opportunity to extend the named recognition upon the terms and conditions agreed to amongst the Donor, relevant Partner(s), and the FCO.

9. Lead Agencies may choose to partner with Agency Fundraising Organizations (AFO) to raise funds for their Foundry centre. Such partnerships are valued and reflect the mission of Foundry. In such cases, the leadership role of Foundry Lead Agencies must be included in any publicly-facing communications from the Lead Agency, AFO or otherwise.

10. These Practice Guidelines may change from time to time.

VI. <u>JURISDICTION</u>:

These Practice Guidelines apply to all organizations fundraising on behalf of Foundry and/or its centres and/or Foundry's online resources, for gifts designated to Foundry and/or its centres and/or Foundry's online resources. It applies to gifts of cash or securities. Partners may elect to apply these practice

guidelines to other types of gifts in-kind that are eligible for charitable tax receipting, such as goods or artwork, should the market value of such gifts fall within applicable Donor Recognition thresholds.

These Practice Guidelines do not apply to recognition honouring other types of contributions that are not eligible for charitable tax receipting, such as time, expertise, or leadership.

VII. ROLES AND RESPONSIBILITIES:

Generally, recognition and stewardship of Donors will be the responsibility of the Partner soliciting and receiving the Donation, with support and coordination provided by the FCO.

Naming Recognition must be documented in writing between the Donor and relevant Partner(s), and between the Partner(s) and the FCO. Such documentation will be the responsibility of the Partner soliciting and receiving the Donation.

VIII. RECOGNITION TYPES AND OPPORTUNITIES:

1. **Naming Recognition**
   Naming Recognition generally falls into three categories: 1) Facilities (inside or outside), including rooms, lounges, or gardens, 2) Programs, such vocational training, peer support or life skills, and 3) Online resources, such as e-health websites or tools. In some cases, naming of positions, such as fellowships, may also be a possibility.

2. **Signage Recognition**
   Signage Recognition may include, for example, inclusion on a plaque or Donor wall; placement of a tribute marker, such as on a bench; or listing on a website.

3. **Communications**
   Communications activities may include news releases, social media, other online recognition, listing on a website, or newsletters.

4. **Events**
   Events may be held to celebrate and announce significant Donations to Foundry or its local centres.

5. **Stewardship Reports**
   Stewardship reports include updates to Donors on the outcomes of their Donations. The FCO will provide regular progress updates; which Partners may use for this purpose.

6. **Thank-You Procedures**
   This may include an organization's standard procedures for thanking donors, such as meetings, tours, phone calls, emails, letters, etc.

IX. PROCEDURES:

1. **Establishing Giving Levels and Recognition Eligibility:**

The FCO will develop recommended giving levels and recognition eligibility in collaboration with its Partners. Such levels and eligibility may change from time to time. (A current schedule is attached as Appendix 1.)

2. **Approval of Naming Recognition:**

    Any Naming or Signage Recognition at Foundry local centres must be approved by the Lead Agency of that centre before a commitment is made to a Donor (i.e., if the Donor Recognition will be for any part of Foundry outside of the Partner's scope or authority).

    Any Naming Recognition affiliated with the FCO or provincial initiatives such as Foundry's online resources must be approved by the Executive Director of the FCO. The Executive Director may elect to seek approval from the Foundry Governing Council.

    In certain cases, naming may be subject to the Province of BC or other governing bodies. Responsibility for securing this approval, as applicable, will fall to the Partner soliciting and receiving the Donation(s). Assistance may be requested from the FCO.

3. **Branding:**
    All Donor Recognition affiliated with a Foundry centre or online space will be aligned with its common brand. Branding guidelines and their application to Donor Recognition (e.g. plaques) will be available from the FCO. Templates for Donor Recognition walls, signage and plaques will be made available by the FCO.

4. **Budget:**
    The FCO will cover costs associated with 1) the design of template Donor Recognition walls and signage, as part of its overall branding package, and 2) the production of at least one initial Donor Recognition wall in each centre. Any additional costs related to Donor Recognition, such as production of plaques or execution of events, will be the responsibility of the Partner securing the Donation(s).

5. **Maintenance:**
    Maintenance of any Donor Recognition (e.g. updating plaques or donor walls) will be the responsibility of the Partner securing the Donation(s).

6. **Documentation and Implementation:**
    Partners will confirm details of Donor Recognition, including specifics of any commitments the FCO must implement (for example, updates to its website), exact wording and a photo where applicable, with Foundry in writing. This information will be catalogued by the organization receiving the Donation, and by the FCO.

X. **CONTACT:**

Questions and feedback are welcomed. Please direct to:

Communications and Development Lead
Foundry Central Office

APPENDIX 1: MINIMUM DONATION LEVELS FOR RECOGNITION

Donors to Foundry will generally fall into one of the following three categories:

1. **Donors to or through the FCO.** This includes:
   o Donors to St. Paul's Foundation;*
   o Donations from Graham Boeckh Foundation;
   o Grants or payments from the Province of BC (Ministry of Health); and
   o Grants or payments from the Michael Smith Foundation for Health Research.

   Donors in this category are eligible for:
   o Any recognition offered by the Registered Charity receiving the Donation (most frequently, St. Paul's Foundation);
   o The FCO recognition, as outlined below;
   o Recognition at a Foundry centre, as outlined below, <u>if</u> the majority of the Donation is designated to a Foundry centre <u>and</u> it is approved, in advance, by the relevant Lead Agency.

2. **Donors to Foundry Online.** This includes Donors to BC Children's Hospital Foundation.

   Donors in this category are eligible for:
   o Any recognition offered by the Registered Charity receiving the Donation; and
   o Foundry online recognition, as outlined below.

3. **Donors to local sites, through Lead Agencies and/or AFO's.**

   Donors in this category are eligible for:
   o Any recognition offered by the Registered Charity receiving the Donation (most frequently, a Lead Agency);
   o The FCO recognition, as outlined below; and
   o Recognition at a Foundry centre, as outlined below and upon approval of the relevant Lead Agency.

<u>**DONOR RECOGNITION MATRIX:**</u>

Notes:

1. The FCO's recognition, and support in implementing that recognition, may be limited to the Foundry prototype phase ending March 2018.
2. Giving levels may vary between communities.
3. Donation amounts typically represent cumulative donations and pledges to the prototype phase, and are inclusive of Peer to Peer fundraising efforts or in-memoriam tributes (i.e. cumulative group giving).
4. Should the need arise, a cumulative lifetime giving recognition program will be developed in future.

Category #1: Central Foundry Recognition, for Funds to the FCO or Foundry's online resources

Note that central the FCO recognition and support in implementing that recognition may be limited to the Foundry prototype phase ending March 2018.

	$10K	$25K	$100K	$250K	$500K	$1M+
Communication and Updates						
Thank you email/ letter or phone call from ED	x	x	x	x	x	x
Annual Donor Update (written or in-person, as preferred. If written, material will be provided to charity stewarding the gift)		x	x	x	x	x
Digital and Print						
Social media (once social channels are activated)	x	x	x	x	x	x
Listing on website Donor Recognition page (for current donors only)	x	x	x	x	x	x
Listing on website Background page (to acknowledge contributors to previous and historical iterations of Foundry programs and functions)	x	x	x	x	x	x
Acknowledgement, for a defined term, as Donor to specific product (where the Donation funded the bulk of the project - e.g. peer support training manual)		x	x	x	x	x
Acknowledgement in the FCO presentation materials (e.g. conference PPTs)					x	x
Tours and Events						
Invitations to Foundry Events (if/ as scheduled; and upon approval by Lead Agencies if events are site-specific)		x	x	x	x	x

Meeting and/or tour with ED				x	x	x	x
Private Recognition Event (if not offered by charity receipting the Donation)							x
Naming							
Naming Level 2 (for a limited-scope, limited-term program operating out of the FCO (e.g. peer support knowledge exchange initiative). Naming **not** available for Foundry centres nor the FCO).					x	x	
Naming Level 1 (for a widely-known, ongoing program operating out of The FCO (e.g. youth engagement). Naming **not** available for Foundry centres nor for the FCO).							x

Category 2: Funds Flowing to Local Site

* Lead Agencies are welcome to use the template below to document their recognition thresholds, or to use an existing template.

* All site-specific recognition must be approved by the Lead Agency before any commitments are made to the Donor. Recognition will not unreasonably be withheld, but must be in alignment with Lead Agency recognition and gift acceptance policies. 2) Lead Agencies at AFO's may wish to add recognition benefits available through their organizations, such as event invitations, donor updates, gift announcements, tours, etc.

	$1K	$10K	$25K	$100K	$250K	$500K	$1M
Thank-You Procedures							
Thank-you email/letter and/or phone call from (?)	x	x	x	x	x	x	x
Thank you email/letter from the ED of Foundry		x	x	x	x	x	x
Communications and Updates							
Annual Donor Update (written							

or in-person, as preferred)						
Digital and Print						
Publishing on Lead Agency social media, boosted by Foundry social media						
Listing on Foundry main website		x	x	x	x	x	x
Listing on Lead Agency website						
Physical Recognition						
Listing on site Donor Wall, Level 3 Terminology to come with branding)						
Listing on site Donor Wall, Level 2 (Terminology to come with branding)						
Listing on site Donor Wall, Level 1 (Terminology to come with branding)						
Individual plaque						
Tours, Events and Announcements						
Tour and/or meeting with (?)						
Invitations to Lead Agency Foundry Special Events (if/ as scheduled)						
Private Recognition Event						
Public Donor Announcement,						

with media release						
Naming						
Naming Level 3 (small or low-traffic space or item, e.g. small meeting room. Thresholds vary by site).						
Naming Level 2 (medium-visibility local program, e.g. culinary skills; or medium-traffic space, e.g. a resource room or lounge).						
Naming Level 1 (highly-visible local program, e.g. peer support; or large, high-traffic space, e.g. foyer, wing)						x (largest space should be reserved for largest possible gift anticipated)

·FOUNDRY·
WHERE WELLNESS TAKES SHAPE

Sample: Case for Support

Foundry: Overview

Foundry envisions all our young people having the resources necessary to thrive: outstanding, coordinated, timely and accessible services. Whether it's solution-focused counselling, treatment for depression or problematic cannabis use, a health concern, connections to employment, or a need for supportive peers, young people and their families should know where to go. **In Foundry communities, young people and their families no longer have to ask, "*Where can we go for help?*"**

Foundry is removing barriers and increasing access to quality care through our province-wide network of integrated youth wellness centres for young people ages 12 to 24, and their families. Foundry centres bring mental health care, substance use services, primary care, youth and family peer support, and social services under one roof, making it easier for young people to find support in their communities. Online resources and virtual care further broaden Foundry's reach.

Foundry's network currently includes 11 community-based, partnership-driven centres across BC – in Campbell River, Victoria, North Shore, Vancouver, Ridge Meadows, Abbotsford, Penticton, Kelowna, and Prince George, with centres in Richmond and Terrace currently in development. An additional eight Foundry centres are set to open by 2023.

Foundry believes that young people should have a voice in their care, and that finding the right support should not be difficult. By bringing together a variety of health and social services under one roof and working in partnership with young people, families, and their communities, Foundry is helping young people in British Columbia get the help they need, when they need it. Foundry is committed to working with our partners to change lives - because young people are our future.

For more information, please visit **foundrybc.ca** or contact:

Dr. Steve Mathias
Executive Director
E: smathias@foundrybc.ca

Rebecca Sharma
Lead, Philanthropy & Communications
E: rsharma@foundrybc.ca

Foundry was made possible by donors, policymakers, clinicians, and young people and family members working together, sharing a common vision and creating community transformation.

Hosted by Providence Health Care, Foundry BC is supported by the Province of BC, Graham Boeckh Foundation, Michael Smith Foundation for Health Research and donors to St. Paul's Foundation.

1

A need – and opportunity

Our young people are full of promise and potential, but face challenges to their wellness – including higher rates of mental illness and substance use than any other age group.

In Canada, an estimated 70% of mental health problems begin during childhood or adolescence.[i] And while one in five young people aged 15-24 report experiencing mental illness or substance use problems,[ii] fewer than 25% actually receive appropriate services.[iii] Sadly, suicide is among the leading causes of death for Canadian young people.

Encouragingly, more young people are seeking help as mental health literacy increases and stigma fades. But there remains an absence of accessible, low-barrier services, so young people don't know where to go, and often resort to walk-in clinics or, worse – their local emergency departments. In some British Columbia regions, there has been an 85% increase in emergency department visits over five years (2009 to 2013) for youth aged 15 to 19.[iv]

Meanwhile, mental ill health, and its economic burden – costs to individuals, families, communities, governments, health systems, and employers – is expected to increase in the coming decades. At the same time, Canada's working-age population will shrink.[v] For a strong future, we need vibrant and healthy young people living full, productive lives.

Foundry makes it easy for young people to find youth-friendly, welcoming and appropriate services – by simply walking into their local Foundry centre; or by exploring the tools and resources at foundrybc.ca. Foundry reaches young people earlier – before their health concerns have a severe impact on their families and their relationships, their health and wellbeing.

"Foundry is about community, about strength. It's about resilience and it's about being welcoming."
- Judy Darcy, Minister of Mental Health and Addictions

"The genuine care that is involved with the whole institution, from front desk to the doctors and nurse practitioners. I have love in my heart for all those who work here."
- Young person accessing Foundry services

Foundry does things differently

Foundry draws on the strengths of communities by fostering a model that encourages and rewards organizations to work together, and to deliver care that is acceptable and available to youth and families, under one roof. Foundry makes this happen by doing things differently – this is how.

We are a provincial leadership and standards team.
Our Foundry central office team facilitates the Foundry provincial network and builds capacity within communities. We lead comprehensive site selection and business planning processes, activate knowledge-sharing, coordinate across systems, create clinical pathways and service standards, move evidence into practice, collect and manage consistent data, conduct evaluation, and support local partnership development, governance, capital project management, communications and fundraising.

We engage partners and communities.
Foundry is built on partnerships – over 150 of them. Each Foundry centre is led by a local agency, most often a nonprofit, that has exceptional leadership and a commitment to our vision. Our lead agencies engage deeply with their communities and bring together local partners – including school districts, government agencies, indigenous organizations, and non-profit service providers – to ensure their Foundry centre meets the needs of their young people and families.

We stand by our commitment to meaningfully engage youth.
Foundry puts youth and families at the centre and builds systems around them. Foundry engages with youth and families as decision makers, at the governance, leadership and community levels. Foundry centres are youth-friendly, welcoming, and destigmatizing, and share a visual identity, so young people know where to find help no matter where they are in the province. Foundry's name and identity were developed with input from youth and families from across BC and Canada, and in consultation with Indigenous partners.

Jane Philpott
@janephilpott

Loved meeting the impressive team at @Foundrybc @Providence_Hlth "where wellness takes shape" for youth in Vancouver Granville

4:08 PM - 12 Jun 2017

38 Retweets 60 Likes

"… imagine better ways to respond to young people in need …[with] an outstanding space where youth feel at home and have their health and social needs addressed in a welcoming, holistic setting."
- Federal Minister of Health Jane Philpott, speaking about Foundry.

We optimize resources by integrating services.

Foundry convenes, streamlines, and builds on existing resources. Foundry brings together local government and nonprofit agencies as partners, co-locating and integrating services. New annual provincial government funding helps to complete remaining gaps, ensuring centres are sustainable. Donors play a critical role in establishing centres and supporting local programming and innovation. Integration is supported by our Integrated Stepped Care Model (ISCM) – a new way of organizing services so young people receive the right level of care at the right time – improving system efficiency and efficacy, and so that young people have seamless care experiences.

We collect data and evaluate meaningful outcomes.

Foundry is committed to doing what works. We are measuring impact provincially through a robust evaluation platform using a shared provincial data collection system – the first of its kind in Canada. This will enable us to measure the outcomes of services, inform policy; and over time, analyze the health and economic outcomes of early intervention. We also employed a developmental evaluation to track our work, course correct in real-time, and capture our learning – so we can share it with others.

We foster national and international linkages.

Foundry connects across provinces and countries to improve the wellness of youth worldwide. We are a lead partner with Frayme, an International Networks of Centres of Excellence Knowledge Translation Platform funded by the Government of Canada, to mobilize knowledge about integrated youth services and enable their implementation nationally. Foundry consults for those creating similar models – including in Ontario, Newfoundland, Alberta and Quebec; and also, the state of California.

Foundry Vancouver-Granville

VISION: Foundry is transforming how youth and young adults access health and social services in BC, and across Canada and beyond, by sharing our knowledge and experience.

MISSION: Foundry aims to improve care pathways for young people through individualized, integrated health and social services. Guided by shared values and through an evidence-informed approach, Foundry works with communities to improve access to quality care by establishing inter-ministerial and multi-sectoral partnerships to create integrated health and social service centres across BC. Foundry offers a unique, consistent experience for every young person and family member who enters its network of care, empowering them to optimize their health and well-being.

Sustainable partnerships and funding

Foundry is made possible by donors, government, community and nonprofit partners working together. We were launched in 2015, as a proof of concept, with funding from the BC Ministry of Health, the Graham Boeckh Foundation and donors to St. Paul's Foundation, with the goal to demonstrate outcomes and create a platform for scaling. This initial funding created the Foundry central office team, provided capital grants for an initial five – and then five more – new centres, and supported our evaluation.

The Ministry of Health provides additional annual operating funds, complementing an average of $1-2 million per site in existing community resources, to fill remaining gaps and complete the Foundry model of care.

Foundry Lead Agencies also lead local fundraising campaigns in their own communities, and BC Children's Hospital is providing $2 million over five years from philanthropic sources, including RBC, for foundrybc.ca.

This unique partnership funding model ensures that Foundry centres meet the needs of their local communities and, importantly, are sustainable in the long-term.

The Foundry network served 9,770 unique youth in 2019.

Foundry's 2019 Youth Experience Survey found:

- **96%** of young people accessing services either strongly agreed or agreed that they would describe Foundry as a "youth-friendly" place.
- **96%** of young people accessing services either strongly agreed or agreed that if a friend needed this sort of help, they would suggest Foundry.
- **92%** of young people accessing services either strongly agreed or agreed that they got help for the things they wanted to get help with.
- **91%** of young people accessing services either strongly agreed or agreed that they felt more able and prepared to manage their current situation or health condition because of their contact with Foundry.
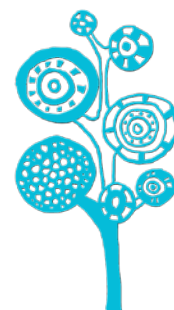
What we've accomplished so far

Foundry Campbell River

Foundry is an initiative conceived with, and driven by, philanthropy. Its origins go back to 2007, when donors to St. Paul's Foundation provided seed funding to create Providence Health Care's Inner City Youth Program (ICY). ICY was an outreach program, led by psychiatrist Dr. Steve Mathias, serving marginalized inner-city youth. In 2012, philanthropy made it possible for ICY to expand from a handful of staff to a team of 30 interdisciplinary professionals and leveraged sustainable funding through the health system.

Shortly thereafter, the ICY team identified the need for a community-based storefront to serve as an access point, where all staff could integrate their services to provide wrap-around, easily accessible care for clients. Donors again made this happen – providing capital funding for the Granville Youth Health Centre (GYHC), which opened in March 2015. GYHC – now rebranded to Foundry Vancouver-Granville - is the prototype centre informing Foundry.

Following Foundry Vancouver-Granville, five Foundry centres were established across BC during a proof of concept phase, including the establishment of a provincial Foundry central office to oversee the development of Foundry's network. A rigorous evaluation of Foundry's integrated service model and network of centres was commissioned to ensure Foundry was achieving positive outcomes. Click the following links to download Foundry's Proof of Concept and Developmental Evaluation reports.

As Foundry continued to expand and demonstrate sustained success in improving the health and wellness of young people and integrating services in communities throughout BC, jurisdictions across Canada and the world have expressed interest in the Foundry model. This includes not only youth mental health organizations, but also health groups that would benefit from integrated services and collaborative care, such as chronic pain, sleep disorders, and geriatric care.

"Foundry represents a unique opportunity for donors to support innovation in youth mental health services, and to have an out-sized impact by leveraging new funding from the province, along with the assurance of rigorous evaluation and support from Foundry central office."

- Rob Boeckh, Graham Boeckh Foundation

Our future vision

Foundry's vision is to transform access to services with and for young people in BC – and while we are excited about our progress, the future is even more promising.

As part of the Ministry of Mental Health and Addiction's "A Pathway to Hope" strategy, Foundry is thrilled to partner with communities across BC to open and operate eight additional Foundry centres, bringing Foundry's network to 19 centres province-wide over the next few years.

Donors, government, community, nonprofits, young people and families/caregivers will continue to play an important role in our future. We welcome you being in touch as our plans develop.

[i] Statistics Canada (2006). *Population and Dwelling Counts, for Canada, Provinces and Territories, 2006 Ad 2001 Censuses – 100% Data.* Retrieved from www12.statcan.ca/census-recensement/2006/dp-pd/hlt/97-550/Index. cfm?TPL=P1C&Page=RETR&LANG=Eng&T=101

[ii] Kirby, M. & Keon, W. (2004). *Report 1, Mental Health, Mental Illness an Addiction: Overview of Policies and Programs in Canada.* Interim Report of the Standing Senate Committee on Social Affairs, Science and Technology.

[iii] Canadian Institutes of Health Research Institute of Human Development, Child and Youth Health (CIHR – IHDCYH). (2010). *Access and Wait Times in Child and Youth Mental Health: A Background Paper.* Canadian Association of Paediatric Health Centres, National Infant, Child and Youth Mental Health Consortium Advisory, and Provincial Centre of Excellence for Child and Youth Mental Health at CHEO.

[iv] Canadian Institute for Health Information. (2015). *Care for Children and Youth with Mental Disorders.* Retrieved from: https://secure.cihi.ca/free_products/CIHI%20CYMH%20Final%20for%20pubs_EN_web. pdf

[v] Library of Parliament (2013). *Current Issues in Mental Health in Canada: the Economic Impact of Mental Illness.* Retrieved from http://www.lop.parl.gc.ca/content/lop/ResearchPublications/2013-87-e.pdf

Sample: Web Page

Archway
Community Services

About ∨   Programs   Stories   News   Events ∨   Contact   **DONATE**   🔍

Support Foundry

$50
Prescription Medication for a youth without coverage

$160
1 week of peer support

$300
5 Counselling Sessions
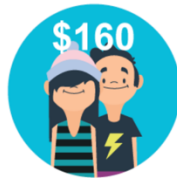
$625
Cooking Class for 15 youth

Foundry Abbotsford

We provide safe, non-judgmental care, information and resources, and work to reach young people and their families where they are at. Foundry brings health and social services together in a single place to make it easier for young people to find support, care and connection.

Make a donation 🔒
DONATION DETAILS
AMOUNT

Your donation helps support mental and physical health for youth in our community.

$50 – Prescription medication for a youth without coverage

$160– 1 week of peer support

$300 – 5 counselling sessions for a

Sample: Gift Chart

Gift Amount	# of Gifts	# of Prospects	Cumulative Total
$150,000	1	4	$150,000
$75,000	2	8	$300,000
$40,000	4	16	$460,000
$20,000	8	24	$620,000
$10,000	16	32	$780,000
$5,000	24	48	$900,000
$2,500	40	80	$1,000,000

Sample: Pledge or Donation Card

Front

WHERE
WELLNESS
TAKES
SHAPE

·FOUNDRY·
ABBOTSFORD

Operated by Abbotsford Community Services

Back

Your donation means our young people and their families find connection, care, and support—for all of life's challenges.

·FOUNDRY·
WHERE WELLNESS TAKES SHAPE

Abbotsford
Community
Services
People Helping People

ONE TIME GIFT
- [ ] $50
- [ ] $100
- [ ] $250
- [ ] $1000
- [ ] OTHER $ _____

PAYMENT OPTIONS
- [ ] VISA
- [ ] MASTERCARD
- [ ] AMEX

NUMBER | | | | | | | | | | | | | | | |

Expiry | | | | | | | CVC | | | |

MONTHLY SPONSOR
- [ ] $30
- [ ] $60
- [ ] $90
- [ ] OTHER $ _____
- [ ] ANNUAL GIFT $ _____

- [ ] Cash
- [ ] Cheque attached (Payable to Abbotsford Community Services)
- [ ] Bank Account Withdrawal (VOID Cheque attached)
- [ ] 1st of each month (or)   [ ] 15th of each month

Name on card _____   Date _____

Signature _____

Abbotsford Community Services
Address: 2420 Montrose Avenue, Abbotsford BC V2S 3S9 Phone: 604.859.7681
www.abbotsfordcommunityservices.com/donate-today

FIRST _____

LAST _____

ADDRESS _____

CITY _____

PROVINCE _____   POSTAL CODE _____

PHONE (HOME) _____

PHONE (CELL) _____

E-MAIL _____

- [ ] Please send me your newsletter
Charitable Registration Number: 10686 3392 RR0001

Template: Foundry Donor Wall

Version 1
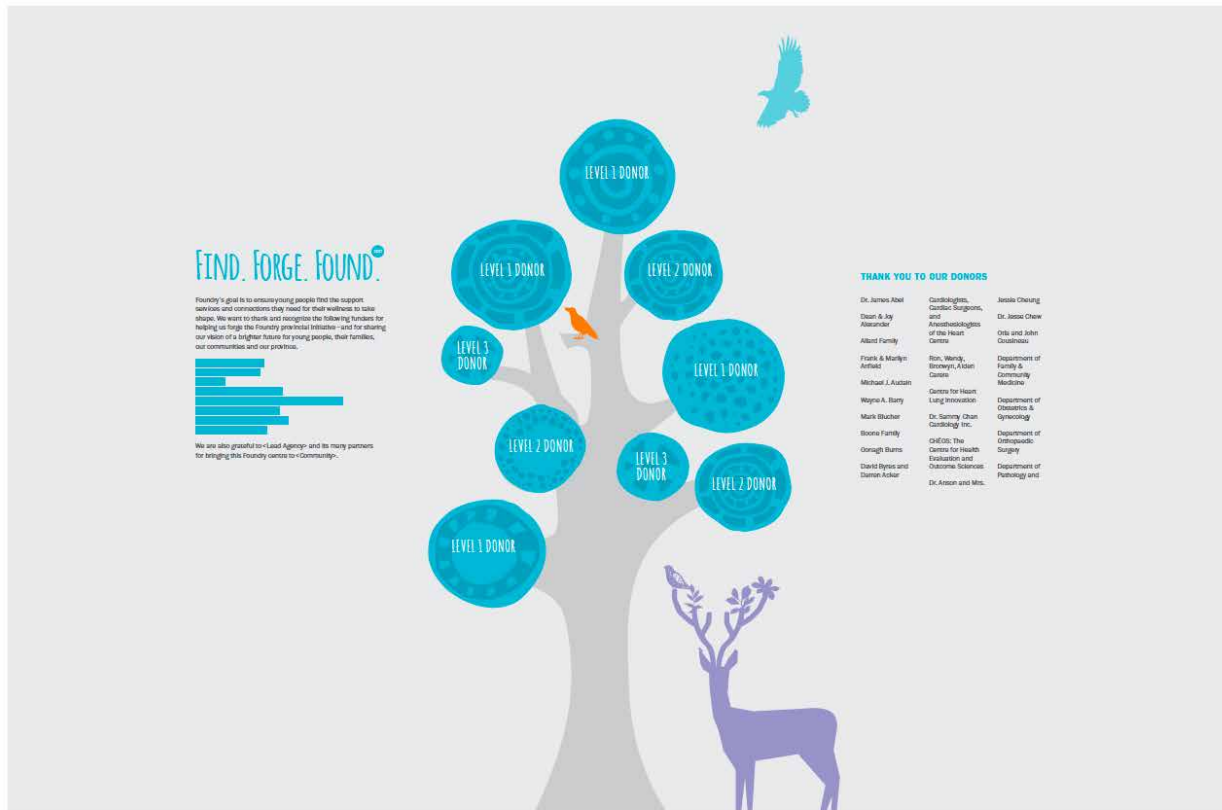
FOUNDRY DONOR DISPLAY

Small Cog
- Blue cog on the donor wall (8.25" x 8")

Medium Cog
- Blue cog on the donor wall (12.25" x 12")
- Plaque (approx 20" x 9.5", up to 25 words)

Large Cog
- Blue cog on the donor wall (16.2" x 14.857")
- Plaque (approx 16" x 26", up to 25 words)

Version 2

Find Forge Found

Foundry's goal is to ensure young people find the support, services and connections they need for their wellness to take shape. We want to thank the following funders for helping us forge the Foundry provincial initiative.

Province of BC
Graham Boeckh Foundation
North Growth Foundation
Michael Smith Foundation for Health Research
Robert L. Conconi Foundation
Goldcorp
Y.P. Heung Foundation
Diamond Foundation

Foundry acknowledges the BC Ministry of Health, the BC Ministry of Children and Family Development, the BC Ministry of Mental Health and Addictions, the Graham Boeckh Foundation, the InnerChange Foundation, the Michael Smith Foundation for Health Research, Providence Health Care, and St. Paul's Foundation for their leadership in creating the initiative.

Abbotsford Community Services is grateful to our donors for sharing our vision of a brighter future for our young people, their families, our community and province.

Leaf labels on tree:
- OAK TREE FOUNDATION
- VANDERPOL FAMILY
- THE KLASSEN FOUNDATION
- ROTARY CLUB OF ABBOTSFORD
- HUB INSURANCE
- BRYDEN PAYER
- STATTONROCK DESIGN AND BUILD
- FORT LANGLEY LIONS CLUB
- KARA AITON M.D. INC
- RYAN DONALDSON MEMORIAL

Dimensions: 82.9" | 27.8" | 44" | 69.4" | 27.8"

THANK YOU TO OUR PARTNERS

Abbotsford Community Services
Abbotsford Youth Health Centre
AbbotsfordWORKS
Youth Resource Centre

Fraser Health
Short Term Assessment Response Team
Early Psychosis Intervention
Adolescent Day Treatment Program

Ministry of Child and Family Development
Youth Team
Child and Youth Mental Health

Ministry of Social Innovation and Poverty Reduction
Services to Adults with Development Disabilities
Income Assistance

Fraser Valley Youth Society

Fraser Valley Aboriginal Children and Family Services

Impact

School District 3

We acknowledge that we are gathered on the traditional, ancestral, unceded shared territory of the Matsqui First Nation and Sumas First Nation. The Semá:th and Máthxwi are part of the Sto:lo Nation and have lived in the Fraser Valley for over 10,000 years.

AND SUPPORTING PARTNERS

Division of Family Practice
PHSA Trans Care BC
UBC Family Residency Program
Innovative Fitness
City of Abbotsford
FHA Public Health

Template: Foundry Standardized Donor Plaque

LARGE COG

Donor Wall Cog
Blue leaf on the donor wall
16.2" x 14.85"

Plaque
Standard Format
• Clear acrylic panel
• Digitally printed imagery

Specs

Visual size	16" x 26"
Word count	Up to 25 words
Photo or logo option	Yes
Language option	Yes

Budget Range

Layout	$150 – $200
Fabrication	$600 – $900
Installation	n/a

LARGE COG

Donor Wall Cog
Blue leaf on the donor wall
16.2" x 14.85"

Plaque
Standard Format
• Clear acrylic panel
• Digitally printed imagery

Specs

Visual size	16" x 26"
Word count	Up to 25 words
Photo or logo option	No
Language option	Yes

Budget Range

Layout	$150 – $200
Fabrication	$600 – $900
Installation	n/a

MEDIUM COG

Donor Wall Cog
Blue leaf on the donor wall
12.25" x 12"

Plaque
Standard Format
• Tempered glass panel
• Digitally printed imagery
• Text and silver vinyl applied
  to the backside

Specs

Visual size	20" x 9.5"
Word count	15
Photo or logo option	No
Language option	Yes

Budget Range

Layout	$125 – $200
Fabrication	$400 – $600
Installation	n/a

SMALL COG

Donor Wall Cog
Blue leaf on the donor wall
8.25" x 8"

Plaque
Standard Format
• Clear acrylic panel
• Digitally printed imagery

Specs

Visual size	8" x 2.5"
Word count	15
Photo or logo option	No
Language option	Yes

Budget Range

Layout	$50 – $125
Fabrication	$200 – $300
Installation	n/a
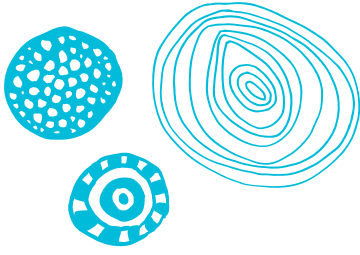
Centre Services and Operations

Setting the Foundation for Service Model Implementation

In our work with communities to date, we have identified 4 themes and development tools to support planning and development. Below are key activities supporting implementation.

(A) Organizational Development

- Create a governance structure (See Section 2, Leadership & Governance)
- Develop community engagement and communication strategy

    i. Youth and Family Engagement
    ii. Regional and Provincial Partners
    iii. Local Leadership & Centre Partner Development

- Develop a change management strategy to support new service model and practice

- Work with partners to support team development

    i. How will team members work together to achieve Foundry Vision
    ii. What does the Foundry Vision mean in in local community context
    iii. Create team development agreement

(B) Community partnership development

- Conduct Centre Services Supports Scan

    i. Identify which services Lead Agency offers
    ii. Identify services available in the community that support Foundry model
    iii. Solicit in-kind resources to support delivery of services at Foundry centre
    iv. Development strategic partnerships to complement existing agency services and fill gaps

- Educate partners on the Foundry Service Model, including ISCM as the core framework for service partnership development

- Determine if partners can contribute to:

    i. Software lease costs
    ii. Lease costs & shared services,
    iii. Shared administrative staff
    iv. Foundry and ISCM services

- Sign MOUs or Collaboration Agreements with Partners

- Refer to Integrating with Intention document

(C) Operations Planning

- Create an organizational chart and identify reporting structure

- Develop staffing model
    - Identify Roles and Responsibilities of both lead agency and service partners

- Policy and Procedure Development

    i. Review exiting policies and procedures
    ii. Establish shared agreement that fulfills each organizations requirements
    iii. New staff Orientation and annual training plan for frontline team members

- IT Requirements

    iv. Assess partner functional requirements (computer, internet access, documentation) to operate on site
    v. Ensure Toolbox IT requirements accommodated
    vi. EMR

- Communication

    vii. Team meetings
    viii. Internal Referrals (Use of Toolbox or EMR)
    ix. External Referrals (referral template)

(D) Service Planning

- Client Care Planning
- Service Pathways
- Most Responsible Care Provider
- Collaborative Care Planning Rounds
- Supervision
- ISCM operational requirements

FOUNDRY.
WHERE WELLNESS TAKES SHAPE

Service Elements and Clinical Modalities

Here are the key components of services within Foundry.

The following table is meant to facilitate discussions with community partners, helping identify which services they can offer.

Foundry Centre Services	Mental Health	Substance Use	Primary Care	Peer Support	Social Services
Walk-in (SFBT)	√	√			
Screening/Intake/Assessment	√	√			
Brief Intervention (2-6 sessions)	√ (SFBT)	√			
Short Term Therapy (6-12 sessions)	√ (CBT)	√ (e.g. MI, CBT)			
Psychiatry	√	√			
Shared Care	√		√		
Addictions Medicine		√	√		
Primary Care (Physical Health)			√		
Primary Care (Sexual Health)			√		
Health Promotion/Prevention/Harm Reduction	√	√	√	√	√
Wellness Groups/Social Groups	√	√		√	√
Psychoeducation Groups	√	√		√	
Clinical Groups	√ (CBT, DBT informed)	√ (MI, CBT)			
SMART Recovery		√		√	

Service			
Seeking Safety	√		
After-care Support	√		
Family Services	√ (EFFT)	√ (EFFT)	√
Peer Support Services		√	√
Outreach		√	√
Income Assistance			√
Housing Support			√
STADD Navigation			√
Employment Support			√

Centre Services and Supports Scan (Environmental Scan)

Please identify existing health and social services offered in your community and consider whether there is an opportunity for them to operate out of a Foundry center or deliver existing services in an integrated manner. This document will be used to support building out the Integrated Stepped Care Model within your community.

- Please note that this is a working document – focus is on current state at first
- As much as possible, consider contacts for this to include those who are responsible for supporting the direct day-to-day operations (team leaders, coordinators, supervisors)
- Use this as an opportunity to connect with services – understand if there are any changes coming up that need to be considered (workflows, criteria, etc.) and briefly discuss the vision of Foundry in the community
- The last column is typically completed as a second step though ideas/ considerations often come up during the initial phase
- The Foundry central office Manager, Service Implementation and Integration will be available to support and assist where needed
- Following the completion of the first round of discussions it is recommended to bring this document to a discussion with the Manager, Service Implementation and Integration to identify the following:
  - What are the strengths in each service stream?
  - Are there any identified gaps?
  - What are the opportunities such as: supporting walk in services, on site direct service provision, transition between services?
- Based on this information, a plan should begin to build and discussions with key contacts continue to articulate what the future state will look like
- Information pulled from this should be part of a community mapping exercise with a larger group and will be used to support service composition, service pathways and Integrated Stepped Care allocation.

List the youth/young adult services that are offered in your community and who delivers this service	Primary contact (Name, Role, Phone and E mail)	Briefly describe the service that is provided Describe model or approach for the service (outreach, appointment based, school based)	Age group	Describe existing intake process for service (walk in, referral based etc.)	Is there an opportunity to deliver existing services at the Foundry centre? Is there an opportunity to support new services on-site (walk-in counseling, groups, etc.) Is there an opportunity to support transition between services?
MENTAL HEALTH					
SUBSTANCE USE					

PEER SUPPORT			PRIMARY CARE			SOCIAL SERVICES															

·FOUNDRY·
WHERE WELLNESS TAKES SHAPE

Centre Operations Guidelines

Centre Operations Standards for Integrated Service Delivery

Foundry strives to enhance the experience of young people and their families as they access health and social services. Foundry centres are well positioned to streamline access points to care, a process which involves careful planning with service partners and input from young people and families. Critical components are that services are available during times that respond to community needs and offered concurrently.

The following requirements have been developed with feedback from youth, families and Foundry's Provincial Clinical Working Group. They are in place to guide communities as they establish their centres' service schedule, with principles of integration and access at the forefront.

1. The following walk-in services are offered simultaneously: counselling, physical and sexual health, and peer support.

2. Mental health and substance use services are offered a minimum of 20 hours per week on a walk-in and appointment basis, for a total of 40 service hours per week.

3. Last appointment is at 6pm or later a minimum of twice a week.

4. Group services are offered in the late afternoon/evening.

5. Family groups are offered in the early evening hours with accommodations for childcare as needed.

6. Reception (Medical Office/Admin Assistants) are available during all hours of operation.

Last updated January 2020

The following document has been developed to illustrate how the *Fulop Typology* is applied to support the integration of health and social services at a Foundry centre. The examples outlined are based on the collective experiences of leaders and direct service providers, including the team at Foundry Central Office.

ORGANIZATIONAL INTEGRATION: Organizations brought together formally by mergers or structural change or through contracts between separate organization	Items/activities	Identified challenges
Integrating services relies on the development of intentional partnerships and collaborative working relationships with a shared commitment to transform access to health and social services. Organizational integration sets the stage for systemic integration which describes how agreements at the organizational level are actualized at the centre level.	The following structures support organizational integration and are in place to support decision making and communication between key community stakeholders at the local community level: • Funders/Governance Table • Local Leadership Table • Local Service/Clinical Working Group • Youth and Family Engagement working Group • Physician Compensation Agreement • Memorandum of Understandings • Service Agreements or Contracts • Information Sharing Agreements	• Decision-making protocol between agencies, who is the ultimate decision maker • Up and down communication between staff, leadership tables, working groups • Circling back to youth and families when a decision has been made

FUNCTIONAL INTEGRATION: Non-clinical support and back-office functions are integrated	Items/activities	Identified challenges
Service partners including the lead agency negotiate terms of use on operational matters that support service delivery.	Key areas for discussion: • EMR (shared) • Toolbox • Admin office space & use • Room booking • Licensing costs contributions • Operational costs (phones, computers, printers) • Lease cost contributions	• Multiple EMR's platforms and shared access • Training staff to use multiple data platforms (Toolbox + EMR) • Costs for software licensing for computers as # of users and accounts required increases • Cost for medical supplies particularly for those expanding to include primary care services

	Items/activities	Identified challenges
CLINICAL INTEGRATION: care by professionals and providers to clients is integrated into a single or coherent process within and/or across professionals such as through use of shared guidelines and protocols	Walk-in Counselling and the Integrated Stepped Care model present key opportunities for integration. The overall goal is that the care of young people and families is integrated in a single process in terms of inter-professional and inter-agency communication. • Service providers identify leaders/champions who are willing to support training and knowledge mobilization • Partner agreements for core service provision within ISCM (EFFT, CBT, SFBT, MI & core groups) • Adoption of operational requirements for ISCM • Walk-in Counselling is offered by various partners	• Following common processes/approaches to guide the care pathway - huddles, triage meetings, shared care plans, assessment and screening • Duplication of mental health assessment • Team based care is inclusive of all disciplines (including physicians, peer support workers) • Myths and misconceptions about ISCM and walk-in counselling

	Items/activities	Identified challenges
SERVICE INTEGRATION: different services provided are integrated at an organizational level, such as through teams of multi-disciplinary professionals	Services delivered at Foundry are complementary, cohesive and comprehensive so that young people and families experience seamless service coordination. Processes are in place allowing service providers to coordinate services in a way that minimizes duplication. Streamlined process across partner agencies including: • Registration • Referral (internal and external) • Service/program schedule • Screening and assessments • Release of Information (shared) • Roles, responsibilities and scope of practice for care providers. People need to understand each other's roles and what they do in order to minimize assumptions and promote culture of integration	• Mandated screens/assessments that duplicate information (e.g., BCFPI, other specialized assessments) • Inclusion of peer support workers and access to client records (Toolbox & EMR) • Consent and privacy PIPA and FOIPPA (service providers may fall under different legislations) • Following common processes/approaches to guide the care pathway - huddles, triage meetings, shared care plans, assessment and screening

• Repeated Initial MHSU assessment

• Staff meetings include all service partners • Team meetings for frontline care providers and administration in order to facilitate communication on operational matters

NORMATIVE INTEGRATION: shared values and commitment to coordinating work enables trust and collaboration in delivering health care

Items/activities	Identified challenges
• Developing team agreements that highlight shared values and beliefs • Creating Terms of Reference for various groups • Leaders are critical aware of organization culture and monitor the impact of shared assumptions on organizational culture	• Community organizations with different philosophies of care, values and beliefs

Service partners adopt Foundry's vision and guiding principles by developing a shared understanding of how this translates locally at the centre and in the community.

Vision: Transform access to health and social services for young people and their families

SYSTEMIC INTEGRATION: coherence of rules and policies at all organizational levels

Items/activities	Identified challenges
Examples for consideration: • Shared reporting requirements across service providers • Transparent conversations re: eligibility requirements and how to "service in" • Service transition protocols • Hiring process includes representation from multiple service partners and youth and family/caregivers • Vacation coordination between service partners • Supervision (clinical & administrative) • Policies and Procedures - big P (organizational) and little p (centre)	• Matrix reporting lines across organizations and flow of communication • Staff shortages effecting Foundry centre operations (i.e., lead agency having to fill the gap when partners are unable to recruit for positions offered in-kind) • Adopting Foundry Brand Guidelines and developing a culture of shared accountability

There is a system-wide commitment to integrating with intention, and agreements made at the organizational level (aka governance) are supported by protocols and procedures that support integration at the centre level.
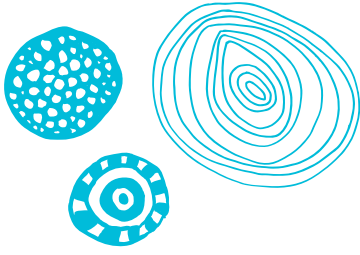
Knowledge Exchange and Training

J.1 **Foundry Knowledge Exchange and Training Reference Guide**

J.2 **Appendix of Foundry ISCM Curriculum and Delivery Pathway**

·FOUNDRY·
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Foundry Training and Knowledge Exchange Reference Guide

To provide Foundry centre leaders with resources to orient to the Foundry model and engage in Knowledge Exchange and Mobilization initiatives designed to support their roles and service delivery

Nina Krack,
Knowledge Exchange and Mobilization Coordinator
nkrack@foundrybc.ca

This guide will be updated as required
Current Date May 28, 2020

Table of Contents

Foundry Provincial Network Knowledge Exchange (NKE Forum)

Location & Details.	Target audience, delivery methods & time frame	Mobilizing knowledge
This is a virtual meeting via Zoom **Facilitators** - FCO Nina Krack, nkrack@foundrybc.ca - Calendar invites sent out by Nina Krack **Centre Expenses** - Staff time - Access to virtual environment	The purpose of this forum is to provide to the provincial Foundry centre leaders a peer networking resource with sharing of ideas, experience, knowledge and resources on common themes. Often varying FCO staff attend as well to support with information sharing and networking as required. This forum is coordinated and facilitated by Foundry's central office Knowledge Exchange and Mobilization Coordinator, Nina Krack. Topics are identified by Foundry centre leads and the Foundry central office team. Please send your theme of interest directly to Nina nkrack@foundrybc.ca or your Implementation Manager. Topics will be confirmed with corresponding emails at least the week prior to the call. From time to time, the topic may be relevant to additional attendees (ie. Clinical staff/partners) which will also be confirmed in the reminder emails. Centre leads may forward the invites to additional centre staff/partners as appropriate. - Primarily every 2 weeks on Tuesdays 2 – 3 pm.	- Interactive discussions, sharing of knowledge and experience. - After the session the following will be attached to the topic invite: ⇒ Some 'didactic' teaching sessions will be recorded and distributed along with resources ⇒ Sharing of resources and tools. - Centre Leads are encouraged to share content of these calls with their teams as they see relevant.

Toolbox		
Location & Details	**Target audience, Pre-requisites, Delivery Methods & Time Frames**	**Continued Practice Support and Competencies**
• Host Foundry Centre **Facilitator(s)** • Project Manager + 1 FCO staff **Centre Expenses** • Staffing time • Staff require computers and good Wifi to access virtual training.	Hands-on and virtual training for frontline staff/users: • All Foundry clinical staff • MOA and Super user • Peer Support • Primary Care • Group Therapists 1. Three months prior to opening: Orientation to partners - Introduction to Toolbox 2. Two months prior to opening: Orientation with lead organization (including ops manager) - Introduction to Toolbox 3. 2 Days prior to opening: time TBD	• Go Live Support: 2-3 days starting from day of launch • Toolbox Roster – reference sheet with links to all the video tutorials and cheat sheets (all staff) • teaching, feedback and Q & A sessions (all staff) Invites via Nina Krack/Outlook (nkrack@foundrybc.ca) • Reflections on Toolbox outcome data shared by Godwin, further planning with FCO supports.
Foundry Integrated Stepped Care Model (ISCM)		
Location & Details	**Target audience, Pre-requisites, Delivery Methods & Time Frames**	**Continued Practice Support and Competencies**
• Host Foundry Centre **Facilitator(s)** • 2 FCO staff • Centre identified 'champion' (1 leader & 1 clinical staff) **Centre Expenses & Resources** • Staff time • Staff require computers and good Wifi to access virtual training. • Refreshments as determined • Training space	After the centre leads have been oriented and a centre 'champion' identified: • All Foundry clinical staff • Peer Support • Primary Care The delivery methods of the curriculum may vary and change to better reflect the context of the audience. 1. 2 – 3 hour initial in-person or virtual team workshop. This may be broken down into shorter sessions to best meet the needs of the team. Planning will happen through discussions with your Implementation Manager and Knowledge Exch.& Mob. Coordinator. 2. Follow-up training as required and planned with centre leads	Planned as per post training evaluation • Centre 'champion' conducts on-site coaching as needed • On-site or virtual coaching with FCO staff as planned/needed • Reference materials • Data and evaluation feedback for further education/skills support planning • Periodically an ISCM Learning Needs survey can support evaluation and further training.

Foundry Walk- in Counselling Solution-Focused Brief Therapy (SFBT)

Location & details	Target audience, Pre-requisites, Delivery Methods & Time Frames	Continued Practice Support and Competencies
SFBT Initial Training for new Foundry Centre **Facilitators** • 2 Facilitators organized by FCO to present • 1 Clinical Centre-leader or designate to support with skills-practice coaching if group is larger than 8 participants **Centre Expenses & Resources** • On-site organization support (Lead and Clerical for organizing the training with KEMb Coordinator) • Staff time • Staff require computers and good Wifi to access virtual training. • Training space • Refreshments as determined • Printing/photocopying as required	• Clinical staff providing Walk-in Counselling and Brief Therapy at Foundry Centre • Clinical Supervisors • Max 16 staff (for 2 facilitators and one centre lead) • Students and interns are only offered seats when they are available. 1. Prior to opening. 2. In-person training: 1.5 days of (typically first day is 9am-4:30pm, second day is 9am-12:30pm) OR 2(b) Virtual training via Zoom: 3 x 0.5 days (9-12am) max. 20 with 3 facilitators 3. Completion of Learning Needs Survey 4. Pre-reading required 5. Handout practice tools and resources	Reference material, books a) 'Effective therapy for Walk-in Clients' - (one copy per centre): b) 101 Solution-Focused Questions - (one copy per centre): c) SFBT Treatment Manual d) Foundry Walk-in Counselling Overview • Foundry Walk-in SFBT Community of Practice Calls: teleconference facilitated by Elise Durante edurante@foundrbc.ca • On-site supervision by centre supervisor or clinical lead. • http://elliottconnie.com/ a resourceful website for free videos • Single Session Video Tom with Dr. Heather Hare

SFBT New staff to your Centre? Each Foundry will be required to support the ongoing training needs of new staff. **Facilitators** - Your experienced SFBT 'champion' or recognized Foundry Co-facilitator can provide orientation and 'start-up' skill training. **Centre Expenses & Resources** - Staff time - Staff require computers and good Wifi to access virtual training. - Travel expenses may be involved for off-site training	1. Clinical Supervisor, or centre lead/senior/co-facilitator WIC SFBT therapist to provide orientation – skill start up for the new clinicians and any interns or students. (The above utilizes the orientation resource package) 2. This can include attendance to local training offered in SFBT in your community or paying for the travel expenses for staff to attend the nearest Foundry centre training as it arises. - Discuss with Nina: nearest hosting Foundry location that may be having some training Please inform Nina nkrack@foundrybc.ca 3. Connect the new staff to the Foundry WIC SFBT monthly CoP	- Foundry Walk-in Counselling SFBT Orientation resource package: - Same as above
Recognized Foundry WIC SFBT Co- facilitators	To support the training and continuing competencies for this practice, a provincial group of recognized co-facilitators has been developed. This achievement includes both pre-requisites and expectations Please connect with Nina. nkrack@foundrybc.ca	- TBD – potential CoP to support both orientation and formal training of new Foundry staff

Emotion-Focused Family Therapy (EFFT)		
Location & Details	**Target audience, Pre-requisites, Delivery Methods & Time Frames**	**Continued Practice Support and Competencies**
EFFT Basic level 1 • FCO contracted certified facilitators: Mental Health Foundations • Please inform Nina nkrack@foundrybc.ca when you have new staff needing training. **Centre Expenses & resources** • Staff time • Computers and good Wifi to access virtual training. • FCO pays the online training expenses for 4 new staff (2020 fiscal)	• Walk-in Counselling and brief therapy clinicians • Foundry Family Peer Support or Ambassadors working with caregivers • Foundry staff providing family therapy or working with family members • Foundry clinical supervisors 1. In person independently (non-FCO specific) with EFFT certified facilitators. (this is a centre lead decision) https://www.mentalhealthfoundations.ca/in-person-trainings 2. Complete identified e- learning courses as available: I. Introduction to Emotion-Focused Family Therapy II. Teaching Emotion Coaching to Caregivers using Didactic & Experiential Techniques	• Homework practice as prescribed by facilitators. • Centre 1:1 and peer supervision groups • Practice support and supervision per centre team plan • Recorded tutorial for basic level skills (ask Nina) • Foundry provincial EFFT Clinical Supervision, facilitated by Natasha Files monthly
EFFT Basic level 2 • FCO hosted at pre-determined location depended on the total Foundry provincial training need. • Usually offered 1 to 2 times per year. • FCO contracted certified facilitators: Mental Health Foundations **Centre Expenses & resources** • Staff time • computers and good Wifi to access virtual training. • Potential travel expense (please refer to the FCO Travel policy and discuss with Nina)	• New Foundry staff, including Family Peer Support, who will be working with Caregivers • Staff who have completed Basic level 1 • Attendee numbers will be determined at time of training event planning 1. In-person or virtual, 2 to 3 day workshop, this will be dependent on centre needs.	• Foundry provincial EFFT Clinical Supervision, facilitated by Natasha Files monthly

EFFT Caregiver Workshop Training	Target audience, Pre-requisites Delivery Methods & Time Frames	Continued Practice Support and Competencies
The Caregiver Workshop is a 2 full day group for caregivers. When delivered virtually, it is 4 half-days.	• As per Centre's EFFT Caregiver Workshop Plan. This plan is developed by the centre lead with their teams. The facilitators will require support not only for facilitating but for group logistics planning: advertisement, registration, location set up, tech, refreshments, handouts etc.	• Virtual Foundry provincial supervision (quarterly) • For maintenance of certification: clinician must run 2 workshops per year.
Facilitators • FCO Contracted facilitators Natasha Files	The lead facilitator for the EFFT Caregiver Workshops *must be certified.*	
Centre Expenses & resources • Staff time as per training outline in Caregiver Workshop Facilitator: • Staff require computers and good Wifi to access virtual training. • Please refer to the FCO Travel policy and discuss with Nina.	Foundry provincial certification cohorts will include a maximum of 5 clinicians. Cohorts will be organized based on centre training needs. A minimum of 1 cohort per year will be run. Co-facilitators and Family Peer Support co-facilitators do not need to be certified. They only require to be trained in, practicing and confident in using the basic level EFFT skills. Ideally, they should have participated in or observed a CW prior to co-facilitating. Please discuss with Nina 1. Upon review of Caregiver Workshop Facilitator: pre-requisites the Centre Lead selects 1 EFFT 'Champion'. 2. Certification process in this order - as per https://efftinternational.org/caregiver-workshop	

Youth Peer Support

Youth peer support workers are an integral part of Foundry's multidisciplinary team. With thanks to funding from RBC, Foundry has created a unique Youth Peer Support curricula and training program. As part of this, FCO offers a train-the-trainer session for leaders to deliver peer support training in their local community. In addition to these sessions, FCO staff will continue to offer support to the centre leads to aim for full integration of peer support services in their centre. See Figure 1 below for a sample pathway of a youth peer support training program. Peer support workers hired to work at a Foundry centre will be invited to participate in Foundry's Provincial Youth Peer Support Community of Practice and be connected to our Provincial Youth Peer Support Coordinator for mentoring.

For more information about Peer Support, see Section 9, Centre Services and Operations, of the *Foundry Start-Up Guide.*

Figure 1. Example of Youth Peer Support Training Program
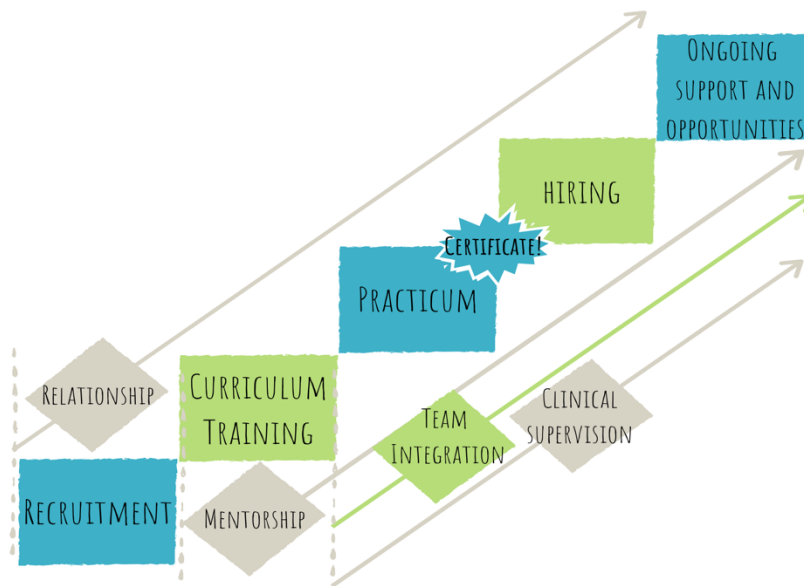
Toolbox Roster of Training Resources

MOA/Front Desk:

Video Tutorial: Toolbox 101 for Front Desk/MOA:

https://www.dropbox.com/sh/esker52jbdjmhnu/AAAVuz0oURutv0ibhqUGntgda?dl=0

Cheat sheets:

1. **Registering New Client or Adding a visit for existing client**: https://www.dropbox.com/s/e71nbzejz0utdiu/Add%20new%20client%20or%20Add%20new%20Visit%20MOA%20v1.0.pdf?dl=0
2. **Push a survey:** https://www.dropbox.com/s/rpa1m79ucpqgftp/Push%20a%20survey.pdf?dl=0
3. **Consolidate Duplicate entries:** https://www.dropbox.com/s/crngvzi20zvxrpt/How%20to%20consolidate%20duplicate%20entries%20V1.0.pdf?dl=0
4. **Why take the surveys (if a young person asks the front desk what the surveys are about – here is a talking points doc that may help answer those questions):** https://www.dropbox.com/s/vpth81atdgs2luc/Why%20take%20the%20Surveys%20V1.4.pdf?dl=0

Service Providers:

Video Tutorial:

- Þ **Toolbox 101 for all service providers:** https://www.dropbox.com/s/39iis534e1otqps/Toolbox%20101%20-%20Service%20Providers.mov?dl=0
- Þ **Tracking groups on Toolbox for Group Facilitators ONLY**: https://www.dropbox.com/s/rfmmglv0pr0lzbb/Toolbox%20Groups%20V1.0.mov?dl=0

Cheat sheets:

1. **EOV FAQ- after ISCM Implementation**: https://www.dropbox.com/s/63cd2birzy3byon/End%20of%20visit%20FAQ%20V4.0_after%20ISCM_inprogress.docx?dl=0
2. **EOV FAQ- before ISCM Implementation**: https://www.dropbox.com/s/eg8upoxhkew2s13/End%20of%20visit%20FAQ%20V1.0_prior%20to%20ISCM_inprogress.docx?dl=0
3. **Accessing my task center to fill out the EOV forms**: https://www.dropbox.com/s/0cxvrrwotup7786/Complete%20my%20End%20of%20Visit%20Forms%20-%20Tasks%20Centre%20V1.0.pdf?dl=0
4. **View Health Survey Report**: https://www.dropbox.com/s/uhlhfvqpj1xardg/View%20Health%20Survey%20Report.pdf?dl=0

Invitation to Foundry Walk-in Counselling Solution-Focused Brief Therapy Co-facilitators

Foundry provides training in Solution-Focused Brief Therapy (SFBT) for all new Foundry centres as part of the orientation to the walk-in counseling single-session model. This training is led by a Foundry central team member who has a clinical counselling background and experience using SFBT.

What is the *purpose* of creating recognized Foundry WIC SFBT Co-facilitators?

As Foundry aims to provide a consistent experience of walk-in services throughout the province, training and orientation to core principles and therapies is critical to the Foundry model. Staff turn-over is inevitable and often, time is of the essence for training so Foundry central is planning on developing a core group of co-facilitators. This group of SFBT co-facilitators will support the ongoing orientation, training and continuing competencies to promote consistency across the province. It's important for Foundry centres to increase their independence and confidence in supporting new staff in learning SFBT. This plan provides an opportunity to support professional development goals for Foundry SFBT clinicians who have an interest in doing so.

In addition, through experience, we have learned that the SFBT training is significantly enriched when it is co-led by a Foundry centre-based clinician.

Clinician benefits of being a Foundry SFBT training co-facilitator:

- Supports professional development opportunities
- Formally recognized by Foundry as a co-facilitator
- Develop teaching and learning facilitation skills
- Increase knowledge and skills in SFBT
- Have opportunity to provide a rich and peer-based teaching/learning environment
- Connect with other Foundry SFBT co-facilitators
- Be involved in the continued planning and delivery of SFBT across the province
- Have the opportunity to visit other Foundry centres
- Be involved in evaluation processes
- Connect with Foundry peers
- Have fun

What are the *expectations* of a Foundry SFBT Co-facilitator?

1. To provide the SFBT orientation and 'start-up' training (not 1.5 full days) and coaching/mentoring for new WIC clinicians in their centres. *There will be a provincial session to identify and disperse the materials to use, for provincial consistency.*
2. At least once per year co-facilitate a full 1.5 days of SFBT training in the province. Travel may be required. When the Co-facilitator is required to provide the training to staff outside of their Foundry centre community; travel and accommodation will be reimbursed to their home Foundry centre. Please connect with Nina Krack for clarification as needed.

Please note that the clinicians' primary role at their Foundry centre is the priority and out of town training is a professional development opportunity therefore their time should be supported by the supervisor and centre leader. We will plan far enough in advance to ensure it works for everyone involved.

1. As the Co-facilitator becomes increasingly comfortable with the model and their facilitation skills, they may lead Foundry SFBT Community of Practice calls.
2. Engage in provincial SFBT planning/evaluation or other opportunities. Your input is valued!

3. **Role for Co-facilitating with FCO lead facilitator (Elise Durante)**
   - Sharing knowledge and experience of Foundry SFBT
   - Prepare and work alongside facilitator
   - Plan who will do what with facilitation
   - Review and be familiar with prepared lesson plan and teaching content
   - Prepare clinical examples to share to support learning of content (theory can be delivered by Elise and other lead facilitators until confident)
   - Pre-coaching/prep session with Elise or other lead facilitators
   - Review pre- and post-learner evaluations.
   - Debrief session with Elise or other lead facilitators
   - Support the orientation of SFBT with new Foundry staff
   - Support the Foundry SFBT CoP calls with rotating facilitation/participation

What are the *pre-requisites* for Foundry SFBT training co-facilitator?

   - The Clinician must have formal SFBT training.
   - Understand the context of single session walk-in counselling at Foundry
   - Have delivered or supervised SFBT in WIC and single session at Foundry for at least one year (clinician dependent)
   - Regular participation in the Foundry SFBT Community of Practice
   - Be supported by their supervisor/centre lead for the role
   - Some experience in mentoring, orientation or facilitation within the Foundry centre

How does a clinician/supervisor decide to be a SFBT Co-facilitator?

Each Foundry centre providing walk-in single session counselling can offer this opportunity to **one** of their clinicians (or a supervisor). It begins with the clinician learning about this opportunity and taking the time to review the benefits, pre-requisites, expectations and role of SFBT Co-facilitator to decide fit and readiness. Feel free to consult with Nina if you have any further questions. Next step is to provide an expression of interest to the supervisor and/or Foundry centre leader. They will let

Foundry EFFT Caregiver Workshop Certified Facilitators

EFFT 2-Day Caregiver Workshop Facilitation Certification through the International EFFT Institute is supported by Foundry when the additional below pre-requisites are met:

- ✓ A Foundry centre (ideally full-time) clinician who has:
- ✓ An unwavering belief in the power of parents and their importance, no matter how they present and what they come with.
- ✓ Will have completed min. 4 days of training (Basic Level 1 & 2 training) provided by FCO and/or via Mental Health Foundations Dr. Adele Lafrance, Natasha Files, and Sheila Paluzzi.
- ✓ Regular practice using EFFT skills with families in single sessions.
- ✓ Partaking in Foundry's EFFT monthly supervision groups.
- ✓ Participating in other regular clinical supervision: 1:1, peer/team with a focus on working on clinician Blocks
- ✓ Experience and confidence in working with family members as there will be a need to establish a collaborative working relationship within the (eventual) co-facilitation dynamic with family peer support.
- ✓ Motivated, interested, and supported by Foundry centre leadership to facilitate family EFFT groups.
- ✓ Supported by their supervisor to participate in 10 – 20 hours of self-learning and preparation time.

Foundry Clinicians who meet the above criteria will be invited into cohorts of no more than 5 Foundry clinician peers from around the province, to fulfill the training guidelines and requirements for the delivery of the two-day general mental health / eating disorders caregiver workshop as per the International Institute for EFFT. The certification cohorts planned by FCO will be offered annually or more often as required.

To **maintain certification:** Clinician will be engaged in peer/group or community of practice for Foundry facilitators of the caregiver workshop. Each clinician should lead two workshops per year to maintain their skills.

For more information please contact:

Nina Krack
Knowledge Exchange and Mobilization Coordinator
Foundry Central Office
nkrack@foundrybc.ca

Provincial Call Schedule Until April 1, 2020

1. **Foundry Walk-in SFBT Community of Practice Calls:** <mark>Tuesdays</mark> 10 – 11 am via Zoom

2. **Emotion-Focused Family Therapy (EFFT) Supervision Calls:** monthly <mark>Thursdays</mark> 10 – 11 am via Zoom – details in calendar invite
   - 4th Thursday of every month

3. **Emotion-Focused Family Therapy Caregiver Workshop Community of Practice or Supervision:** To be confirmed email nkrack@foundrybc.ca

4. **Foundry Provincial Network Knowledge Exchange (NKE Calls):** every 2 and 4th Tuesday of each month. Email nkrack@foundrybc.ca for information

Appendix of Foundry ISCM Curriculum and Delivery Pathway

TABLE OF CONTENTS

Foundry Centre Operations Budget Guide

K.1 Sample: Project Lead Job Description

Start-Up/ Onboarding Job Description Sample: Project Lead

The function of this position is to lead the overall development of a Foundry centre, from selection (or hire) through to the centre opening. Some Lead Agencies have existing staff who can lead this work for the period required, but most need to hire.

Note: This function ends after the centre is open and therefore, will not be funded indefinitely by Foundry dollars. However, if you find a candidate with a strong clinical operations background, who also has the competencies (e.g. project management) required for this position, they may transition into an operations or clinical leadership role after the Foundry centre is open.

Sample Role Description for the position of Project Lead, Centre Establishment

SUMMARY OF ROLE RESPONSIBILITIES

[Lead agency mission]

Within the context of a youth and family-centred model of care, and in accordance with the vision and values of the Foundry provincial initiative, this position promotes a collaborative, respectful, accountable and empowering working environment for youth, families, partners, and staff.

Reporting to the [title], the Project Lead is responsible for leading and coordinating the establishment of a new Foundry centre. This involves creating and implementing a project plan, which encompasses a medium-sized capital project, a clinical service model, and thorough engagement with youth, families, and community members. Works with consultants such as architects, contractors, and designers, and with stakeholders including senior health system staff. Develops strong, collaborative relationships with Foundry central office staff, local partners, youth and families, and other members of the Foundry provincial network. Inspires others to achieve goals and deliverables through facilitation, effective communication and addressing potential barriers to success. Communicates with all levels of staff and management to facilitate consensus, consult, negotiate and share information.

ROLE RESPONSIBILITIES

1. Working closely with Foundry central office, and using tools and resources provided, leads the creation and implementation of a complex, multi-stakeholder project plan, with the goal of successfully opening and operating a new Foundry centre in [community]. The project plan will include the development of governance structures, a capital project and a clinical service model, and will involve youth and family engagement, fundraising, brand implementation, communications, and evaluation.

2. Leads the convening of local partners, including health and social service system partners, Indigenous (First Nations, Metis, and Urban Indigenous) partners, and youth and family

advisors, forming governance groups to advise on and participate in the creation and operations of the Foundry centre.

3. Supervises/ liaises with consultants, contractors, and/or project coordination staff to ensure the project plan is proceeding toward a timely opening of the centre, full integration of services and fidelity to the Foundry brand experience.

4. Acts as the agency's primary point of contact for the Foundry central office during the establishment of the Foundry centre. Creates agendas for and attends regular project meetings, participates in knowledge exchange calls, and travels to occasional provincial gatherings, training opportunities, or events. Ensures relevant agency staff are apprised of, and coordinated in, these activities.

5. Ensures meaningful youth and family engagement is integrated throughout the project, from the outset of planning through to the opening of the Foundry centre.

6. Using resources and tools provided by the Foundry central office, creates detailed project charter and project plans outlining goals, objectives, timelines and project deliverables. Tracks project progress according to project plan, monitors and reports on the status of projects and major issues/obstacles encountered. Makes recommendations regarding projects scope changes, rationale for change, seeks consensus and proceeds as needed.

7. Implements and/or contributes to the implementation of effective processes to assess project risks, identify risk mitigation strategies and monitor risk throughout the life cycle of the project.

8. Develops a budget plan for the project that meets the goals and objectives of the project, monitors expenditures, identifies financial issues, and seeks to adhere to budget or take corrective action. Recommends and/or negotiates contracts for provision of goods and services as required.

9. Communicates with stakeholders, project sponsors and the organization on the scope and status of the project, benefits to stakeholders/others, obligations and responsibilities and changes in processes. Ensures questions and concerns are addressed in order to achieve buy in.

10. Performs other related duties as assigned.

QUALIFICATIONS

Education, Training and Experience
Bachelor's Degree in relevant discipline (Master's preferred) and seven (7) to ten (10) year's recent, related experience including experience in a health care setting that includes managing large-scale, multi-stakeholder projects, leading service operations, facilitating and managing consultation processes with a wide range of stakeholder groups, or an equivalent combination of education, training and experience.

Skills and Abilities

- Knowledge of project management and change management principles and methodologies and ability to coach and coordinate staff.
- Effective communication skills to function within a complex interdisciplinary, cross-sectoral environment involving government, health, nonprofit, and client stakeholders.
- Ability to exercise tact and diplomacy, present as a leader and act with humility when working with partners and stakeholders from across systems and with various backgrounds and perspectives.
- Ability to respectfully empower youth and families, including individuals with lived and living experience with mental health and/or substance use concerns, to ensure their voices and perspectives remain central to the project.
- Experience working in the health or social service systems, or integrated youth service centres, either in an operational management or clinical leadership role, preferred. Experience working with youth or family members with lived or living experience with mental health and/or substance use concerns preferred.
- Ability to use initiative, vision, independent thinking and creative problem-solving abilities to implement project plans and realize project completion.
- Effective facilitation, persuasion and negotiation skills to achieve consensus, resolve conflict and achieve desired outcomes.
- Ability to work effectively under time pressure to meet deadlines, balance work priorities and resolve problems in a timely, respectful and creative manner.
- Functional knowledge of word-processing, spreadsheet, presentation, project management and database applications.

Evaluation and Quality Improvement

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DEMOGRAPHIC SURVEY

- This survey will take approximately 3 minutes to complete
- If you don't want to answer a question, hit the "next"
- Answering the following questions will help us get to know you better.

My guardian is:

Parent(s)

Other family members

Service Agency

Social Worker, Aboriginal Child & Family

Social Worker MCFD

Not Sure

Other (please specify)

I would describe my ethnic or cultural background as

☐ Indigenous (First Nations, Métis, Inuit)
☐ Caucasian (White)
☐ Chinese
☐ Filipino
☐ Japanese
☐ Korean
☐ Latin American

☐ South Asian (e.g. East Indian, Pakistani, Punjabi, Sri Lankan)
☐ Southeast Asian (e.g. Indonesian, Vietnamese)
☐ West Asian (e.g. Afghan, Iranian)
☐ Black (e.g. African, Haitian, Jamaican)
☐ Arab
☐ Prefer not to answer

☐ I don't identify with any of these options (please specify)_____

If "Indigenous (First Nations, Métis, Inuit)" selected, show next two questions

(Answer only if you selected Indigenous) I am:

☐ *Metis*   ☐ *Inuit*   ☐ *First Nations*

(Answer only if you selected Indigenous) I am:

☐ *Status*   ☐ *Non-Status*

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I am a:

☐ Canadian Citizen   ☐ Visitor to Canada
☐ Permanent resident   ☐ Refugee claimant
☐ On a work visa   ☐ Not Sure
☐ On a student visa   ☐ Prefer not to answer

I identify as:

☐ Female   ☐ Two-Spirit
☐ Male   ☐ Not Sure / Questioning
☐ Trans female   ☐ Prefer not to answer
☐ Trans male
☐ Non-Binary
☐ Agender
☐ I don't identify with any of these options (please specify)

My preferred pronoun is:

☐ *He/Him/His*

☐ *She/Her/Hers*

☐ *Ze/Hir/Hirs*

☐ *They/Them/Theirs*

☐ *Just my name please*

☐ *Other (please specify) _____*

I identify as:

☐ Heterosexual   ☐ Asexual
☐ Gay or Lesbian   ☐ Questioning
☐ Bisexual   ☐ Prefer not to answer
☐ I don't identify with any of these options (please specify)_____

I have accessed mental health or substances use services in the last year
☐ *Yes*   ☐ *No*   ☐ *Not Sure*

I found out about this centre/service through

☐ *My worker*   ☐ *Internet/Online search*
☐ *My healthcare provider (e.g. doctor / nurse)*   ☐ *Social Media (Facebook, twitter etc.)*
☐ *My family member*   ☐ *My school counselor / teacher*
☐ *My Friend*   ☐ *Saw the centre*

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☐ *Foundry website*

☐ *Hospital/Urgent Care Clinic*

☐ *Crisis line/Information line*

☐ *Other (please specify)* _____

☐ *Advertising/Promotional Materials (e.g. pamphlet, poster)*

☐ *From someone who received services here*

☐ *Cultural/Spiritual Support Person please specify*

If this centre/service was unavailable, I would have gone to _____ to get the help I needed today:

Your response to this question will help us better understand resources that are available in your community on where to go for help

☐ *Family members/friends*

☐ *Hospital emergency*

☐ *Walk-in clinic*

☐ *My healthcare provider (e.g. family doctor)*

☐ *Emergency services (911)/Crisis Line*

☐ *Cultural/Spiritual Support Person (please specify)____*

☐ *Street nurse*

☐ *My Worker*

☐ *Nowhere/I wouldn't have gotten help*

☐ *My school counselor/teacher*

☐ *Online Support*

☐ *Other (please specify)*

Today I am here to discuss:

☐ *Eating/Nutrition*

☐ *Alcohol/drugs*

☐ *Sexual Health*

☐ *Physical Health*

☐ *My feelings (stress, anxiety, depression)*

☐ *Other (please specify)* _____

☐ *Family*

☐ *School/work*

☐ *Relationships*

☐ *Finances*

☐ *Housing*

I have a family doctor: ☐ *Yes* ☐ *No* ☐ *Not Sure*

Permission to Contact:

From time to time, young people attending Foundry will be contacted to participate in a research or evaluation activity to help provide information to improve Foundry service and find out more about the people who use Foundry.

If I am willing to hear about these opportunities I will mark the "yes" box. This does not mean that I will have to take part, just that Foundry will let me know about it. If I do not want to be contacted for research or evaluation I will mark the "no" box. If I say yes, I can change my mind at any time by telling someone at the front desk.

☐ no
☐ yes

(Answer only if you agreed to be contacted) How would you like to be contacted?

☐ email _____

☐ phone _____

☐ text message_____

Thank you for completing the survey so far. There is one more section to complete; this section will be repeated at future visits to help us understand your needs and how those needs may be changing with time.

In general, how would you rate your <u>health</u>?

☐ poor

☐ fair

☐ good

☐ very good

☐ excellent

In general, how would you rate your <u>mental health</u>?

☐ poor

☐ fair

☐ good

☐ very good

☐ excellent

During the last 30 days, about how often did you feel tired out for no good reason?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel nervous?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel so nervous that nothing could calm you down?

☐ *None of the time*   -

- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel hopeless?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel restless or fidgety?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel so restless you could not sit still?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel depressed?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel that everything was an effort?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel so sad that nothing could cheer you up?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel worthless?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

Thank you for completing the survey.

Did you know? At Foundry, you can find hope, help and support. One of our team members can sit down with you to explore what would be most helpful now.

K10

In general, how would you rate your <u>health</u>?
- [ ] *poor*
- [ ] *fair*
- [ ] *good*
- [ ] *very good*
- [ ] *excellent*

In general, how would you rate your <u>mental health</u>?
- [ ] *poor*
- [ ] *fair*
- [ ] *good*
- [ ] *very good*
- [ ] *excellent*

During the last 30 days, about how often did you feel tired out for no good reason?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel nervous?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel so nervous that nothing could calm you down?

- [ ] *None of the time*   -
- [ ] *A little of the time*   -
- [ ] *Some of the time*   -
- [ ] *Most of the time*   -
- [ ] *All of the time*   -

During the last 30 days, about how often did you feel hopeless?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel restless or fidgety?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel so restless you could not sit still?

☐*None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel depressed?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel that everything was an effort?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

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During the last 30 days, about how often did you feel so sad that nothing could cheer you up?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

During the last 30 days, about how often did you feel worthless?

☐ *None of the time*   -

☐ *A little of the time*   -

☐ *Some of the time*   -

☐ *Most of the time*   -

☐ *All of the time*   -

Thank you for completing the survey.

Did you know? At Foundry, you can find hope, help and support. One of our team members can sit down with you to explore what would be most helpful now.

Total Score: _____

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END OF VISIT FORM

What services did the client receive? (check all that apply)

☐ **Outreach** *(check off this option in addition to the services you are providing, if this visit has taken place outside of the Foundry centre)*

Primary Care – Sexual Health
☐ *Birth control*
☐ *Emergency contraception*
☐ *Pregnancy test*
☐ *STI testing*
☐ *STI treatment*
☐ *Other (please specify) _____*

☐ **Primary Care – Physical Health**
☐ *Illness/Injury*
☐ *Immunization*
☐ *Prescription*
☐ *Eating/Nutrition*
☐ *Trans- care*
☐ *Other (please specify): _____*

Mental Health and Substance Use Services
☐ *Initial/Comprehensive Assessment*
☐ *Mental health*
☐ *Substance use*
☐ *Psycho social rehab - non ISCM pathway*
☐ *Other (please specify) _____*

Rule: If any service under Mental Health Services and Substance Use Services, other than psycho social rehab - non ISCM pathway is selected, show all remaining sections; otherwise hide "ISCM documentation" and "SOFAS rating guide"

Integrated Stepped Care Model

SOFAS rating*: _____
*SOFAS rating guide is available at the end of this form

If the SOFAS rating cannot be filled then specify a reason:
☐ *Not enough information to rate*
☐ *Rater not trained in SOFAS*
☐ *N/A – Primary Care or Substance Use Assessment*

☐ *Assessment Only*

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ISCM Pathway	Step Placement	Intervention(s)
☐ Substance Use	☐ 1 – Active engagement ☐ 2 – Low intensity ☐ 3 – Moderate intensity ☐ 4 – High intensity, Specialist (specify referral) _____ Select Specialist Services - CYMH - Adult Mental Health - ICM/IYOS - Concurrent Disorder Service - OT Assessment/Intervention - EPI - Eating Disorder - Crisis Response Service - Addiction Service - GP/NP Services (Addictions Medicine, Metabolic Monitoring, etc.) - Other (Please specify) ☐ Discharge from pathway	☐ Active monitoring ☐ Information/Education ☐ Self-care ☐ e-Health ☐ Individual Therapy ☐ Group Intervention ☐ Family Services ☐ Psychiatric Services ☐ Medication/Prescription ☐ Harm Reduction ☐ Other (please specify) _____
☐ Mood/Anxiety/Distress	☐ 1 – Active engagement ☐ 2 – Low intensity ☐ 3 – Moderate intensity ☐ 4 – High intensity, Specialist (specify referral) _____ Select Specialist Services dropdown ☐ Discharge from pathway	☐ Active monitoring ☐ Information/Education ☐ Self-care ☐ e-Health ☐ Individual Therapy ☐ Group Intervention ☐ Family Services ☐ Psychiatric Services ☐ Medication/Prescription ☐ Harm Reduction ☐ Other (please specify) _____
☐ Early Psychosis	☐ –Active engagement ☐ 2 – Low intensity ☐ 3 – Moderate intensity ☐ 4 – High intensity, Specialist (specify referral) _____ Select Specialist Services dropdown ☐ Discharge from pathway	☐ Active monitoring ☐ Information/Education ☐ Self-care ☐ e-Health ☐ Individual Therapy ☐ Group Intervention ☐ Family Services ☐ Psychiatric Services ☐ Medication/Prescription ☐ Harm Reduction ☐ Other (please specify) _____

☐ ***Walk-in Counselling***
☐ *Mental health concern*
☐ *Substance use concern*
☐ *Other (text box)*
☐ ***Navigation Services***
Social Services
☐ *Housing support*
☐ *Employment information and support*
☐ *Education*
☐ *Income assistance*
☐ *STADD navigator*
☐ *Other (please specify)_____*
☐ *Youth **Peer Support Services***
☐ ***Groups***
***Group ID:* _____**
Group Name: _____
☐ *Other (please specify): _____*
Client left without receiving any service (please specify why below)
☐ *Service unavailable – client was given appointment for another day*
☐ *Service unavailable – options for other days or other services discussed with client*
☐ *Client chose to leave without being seen*
☐ *Other (please specify):*

External Referrals

☐ Referral to acute/urgent service e.g. emergency services (please specify)_____
☐ Referral to other community service(s) (please specify) _____

Inter-professional Communication: --------------------------------------

☐ VC Registration/Survey Filled

SOFAS Rating Guide

SOCIAL AND OCCUPATIONAL FUNCTIONING: Consider social and occupational functioning on a continuum from excellent to grossly impaired. Include impairments in functioning due to physical limitations, as well as those due to mental impairments. Impairment must be a direct consequence of mental and physical health problems. The effects of lack of opportunity and environmental limitations are not to be considered.	
Superior functioning in a wide range of activities.	100 91
Good functioning in all areas. Occupationally and socially effective.	90 81
No more than slight impairment in social, occupational, or school functioning (e.g. infrequent interpersonal conflict, temporarily falling behind in schoolwork).	80 71
Some difficulty in social, occupational, or school functioning but generally functioning well. Has some meaningful interpersonal relationships.	70 61
Moderate difficulty in social, occupational or school functioning (e.g. few friends, conflict with peers or co-workers).	60 51
Serious impairment in social, occupational or school functioning (e.g. no friends, unable to keep a job).	50 41
Major impairment in several areas, such as work, school, or family relations (e.g. depressed man avoids friends, neglects family and is unable to work; child frequently beats up younger children, is defiant at home and is failing at school).	40 31
Inability to function in almost all areas (e.g. stays in bed all day; no job, home, or friends).	30 21
Occasionally fails to meet minimal personal hygiene (e.g. smears feces); unable to function independently.	20 11
Persistent inability to maintain personal hygiene. Unable to function without harming self or others or without considerable external support (e.g. nursing care and supervision).	10 1

HEALTH SURVEY

- *This survey will take approximately 15 minutes to complete*
- *Although some of the questions may seem personal, they will help the care professional you are about to see understand your situation*
- *If you don't want to answer a question, hit the "next" button*
- *Maintaining your privacy is important to us. Please do not leave this tablet unattended until you are done with the survey*
- *If you need help at any time, just ask at the front desk*

\<topic 1\> HOME

H1 - I live with: (check all that apply)

- ☐ *Mother(s)*
- ☐ *Father(s)*
- ☐ *Both parents at different times*
- ☐ *Stepmother or stepfather*
- ☐ *Grandparent(s)*
- ☐ *Foster Parent(s) \<orange\>*
- ☐ *Other (please specify)_____*

- ☐ *Aunt, uncle, or Other adults related to me*
- ☐ *Brother(s) / sister(s)*
- ☐ *Partner / boyfriend / girlfriend*
- ☐ *Friend(s)*
- ☐ *I live alone \<orange\>*
- ☐ *Child/children \<orange\>*

H2 - I currently live:
- ☐ **In a house, apartment or townhouse**
- ☐
- ☐ **In a group home \<orange\>**
- ☐ **In a homeless shelter \<red\>**

- ☐ **On the street \<red\>**
- ☐ **In a single room occupancy (SRO) \<red\>**
- ☐ **I couch surf \<red\>**
- ☐ **Other (please specify) _____ \<red\>**

If "I couch surf" is selected for H2, skip next question

H3 - I have been homeless or couch surfed in the past month:
- ☐ **no**
- ☐ **yes \<red\>**

If "I live alone" is selected in H1, skip to H4

H4 - I get along with the people I live with:
- ☐ **Never \<red\>**
- ☐ **Sometimes \<orange\>**

- ☐ **Often \<green\>**
- ☐ **Always \<green\>**

H5 – At some point in my life, I have lived with adults who were not my parents

☐ **no**	☐ **other friend**
☐ **foster care \<red\>**	☐ **other (please specify)** _____

☐ other family member	
☐ family friend	

H6 - I have run away from home:
☐ never
☐ thought about it\ *<orange>*
☐ once *<red>*
☐ more than once *<red>*

H7 - I can talk to someone in my family if I have problems:
☐ no *<orange>*
☐ sometimes, depending on the problem
☐ yes, about most things *<green>*

H8 – I can talk to someone outside my family if I have problems:
☐ no *<orange>*
☐ sometimes, depending on the problem
☐ yes, about most things *<green>*

Did you know Foundry has someone you can talk to about your housing situation? Ask the front desk staff for more information.

<topic 2> SAFETY

S1 – In the last three months, I have experienced online bullying:
☐ never
☐ sometimes
☐ often *<orange>*
☐ always *<Red>*

S2 - In the last 3 months, I have seen or experienced some form of violence (e.g., physical, emotional):
☐ no
☐ yes *<Red>*

S4 - I feel safe where I live:

☐ All of the time
☐ Most of the time *<orange flag>*

☐ *Some of the time <red flag and safety alert>*

☐ *Little or none of the time <red flag and safety alert>*

Did you know? If you are worried about your safety or someone else's, we are here to help. You can talk to any one of our team members to see what services could help.

<topic 3> SEX

Se1 - When I have questions about sex, I ask my:

☐ *parent/caregiver*   ☐ *counsellor/worker*

☐ *sibling(s)*   ☐ *doctor/nurse*

☐ *friend*   ☐ *other (please specify) _____*

☐ *A telephone helpline*   ☐ *teacher*

☐ *internet*   ☐ *nobody <orange>*

Se2 - I have had sex

☐ *no*

☐ *thinking about it*

☐ *yes <orange>*

If "no" or "thinking about it", skip to Se7, and hide He12 and He13

Se3 - The last time I was tested for sexually transmitted infections was:

☐ *never*

☐ *more than 3 months*

☐ *less than 3 months*

☐ *can't remember/not sure <orange>*

☐ *I want to get tested <red>*

Se4 I use the following to protect myself from HIV/STIs:

* Use external condoms or internal condoms:

☐ *Always*

☐ *Often*

☐ *Sometimes*

☐ *Rarely*

☐ *Never*

☐ *I don't know*

* Use dental dams:

☐ *Always*

☐ *Often*

☐ *Sometimes*

☐ *Rarely*

☐ *Never*
☐ *I don't know*

Se6 I/we use this/these to prevent pregnancy:
☐ *condoms*
☐ *birth control medication*
☐ *morning after pill/Plan B <red>*
☐ *other contraceptives*
☐ *rhythm method/pulling out <red>*
☐ *none <red>*
☐ *this doesn't apply to me*

Se7 - I would like to talk about birth control and/or my sexual health:
☐ *no*
☐ *yes <red>*

Did you know? Foundry has staff on site who can provide information or advice on sexual health.

<topic 4> EDUCATION

E1 - I am a student:
☐ *no*
☐ *yes*

If "no" selected, show E2 and then skip to E9

E2 - The highest level of education I have completed is:

☐ *Grade 1-6*   ☐ *high school graduate*
                            ☐ *college or other non-university certificate or diploma*
☐ *Grade 7-8*
☐ *Grade 9-10*   ☐ *Registered apprenticeship or other trades certificate or diploma*
☐ *Grade 11 –some grade 12* ☐ *University*

E3 - I am currently going to:
☐ *Elementary School*
☐ *Middle school*
☐ *High school*   ☐ *College*
☐ *Trades school*   ☐ *University*
☐ *Training program (e.g. Culinary, Game Design*   ☐ *Other (please specify) _____*

E4 - School is:
☐ *fun*

☐ *OK*
☐ *Terrible<orange>*

(Minnesota School Survey items being used by McCreary – permission given)

E5 - I feel like I am part of my school:
☐ *Strongly Agree*
☐ *Agree*
☐ *Neither Agree nor Disagree*
☐ *Disagree*
☐ *Strongly Disagree*

E6 - I feel safe at my school:
☐ *Strongly Agree*
☐ *Agree*
☐ *Neither Agree nor Disagree*
☐ *Disagree*
☐ *Strongly Disagree*

E7 - Last month, I missed ___ days of school:
☐ *0*
☐ *1-5*
☐ *6-10*
☐ *11-15 <orange>*
☐ *16-20 <orange>*
☐ *more than 20 <orange>*

E8 - I think about dropping out of school:
☐ *never*
☐ *sometimes*
☐ *often <orange>*
☐ *always <Red>*

E9 - I have a paid job
☐ *no*
☐ *yes*

If "no" selected, skip to E12

E10 – I have had this paid job for:
☐ *less than a month*
☐ *1-3 months*
☐ *4-12 months*
☐ *more than a year*

E11 – I usually work this many hours per week: _____

E12 - My main sources of income are (check all that apply):

☐ *full-time job*   ☐ *employment insurance*

☐
☐ *part-time job*   *panhandling/binning/scavenging/recycling*
☐ *casual work (e.g. Labor Ready)*   ☐ *sex work <Red>*
☐ *student loan*   ☐ *crime <Red>*
☐ *family gives me money*   ☐ *no source of income <Orange>*
       ☐ *other (please specify)*
☐ *income/social assistance (welfare)*   _____
☐ *disability assistance*

E13 - I find it difficult to keep a paid job:
☐ *never*
☐ *sometimes*
☐ *often <orange>*
☐ *always <orange>*
☐ *this does not apply to me*

E16 - Does your money situation stress you out?
☐ *never*
☐ *sometimes*
☐ *often <orange>*
☐ *always <orange>*

Did you know Foundry has someone you can talk to about employment? Ask the front desk staff for more information.

<topic 5> ACTIVITIES

A1 - I like to spend my time (check all that apply):

☐ *Making/playing music*	☐ *shopping*
☐ *drinking alcohol <red>*	☐ *doing/exploring art*
☐ *writing*	☐ *watching tv*
☐ *spending time with pet(s)*	☐ *reading*
☐ *travelling*	☐ *eating*
☐ *getting high <red>*	☐ *smoking <red>*
☐ *drawing*	☐ *being with friends*
☐ *gaming <orange>*	☐ *being with family*
☐ *taking photographs*	☐ *interacting on social media*
☐ *using my cell phone*	☐ *gambling <orange>*
☐ *playing sports*	☐ *Spending time outdoors*
☐ *doing extracurricular activities at school*	☐ Practicing my culture
☐ *exercising (e.g., yoga, running, gym)*	☐ *Vaping <red>*

	☐ *other (please specify)* _____

A2 - I spend this many hours a week exercising
☐ **less than 2 hours** *<orange>*
☐ **2 – 5 hours** *<orange>*
☐ **6 – 10 hours** *<green>*
☐ **11 – 15 hours** *<green>*
☐ **16 – 25 hours** *<green>*
☐ **over 25 hours** *<green>*

A3 - I participate in a sports team, club, or organized group:
☐ **never** *<orange>*
☐ **once a month**
☐ **once or twice a week**
☐ **more than twice a week** *<green>*

A4 - Altogether, how much time do you spend each week doing something that is meaningful and important to you? (i.e. work, volunteering, sports, music, theatre, arts, dance, spending time with friends, engaging in cultural activities)?
☐ **less than 2 hours** *<Red>*
☐ **2 – 5 hours** *<Orange>*
☐ **6 – 10 hours**
☐ **11 – 15 hours**
☐ **16 – 25 hours**
☐ **over 25 hours**

A5 - On average, I sleep _____ hours every day

A6 - On average, I spend ___ hours a day on screens (e.g., watching TV, internet surfing, on social media, texting or playing video games)

☐ **more than 6** *<orange>*

Did you know? If you're looking for healthy things to do, Foundry team members can connect you with sports, social activities and positive skill-building groups.

<topic 6> EMOTIONS

The following questions are about problems that many people have. Some of the questions ask about "significant" problems. A problem is significant when you have it

for two or more weeks, when it keeps coming back, when it keeps you from doing the things you say you are going to do, or when it makes you feel like you can't go on.

Please tell us the last time you had a "significant" problem by answering whether it was in the last month, 2 to 3 months ago, 4 to 12 months ago, or 12+ months ago. If you have never had the problem, you can choose "never." If you are not sure about the answer to a question, please make your best guess. You can also decide not answer a question.

Em1 - When was the last time that you had significant problems with feeling very trapped, lonely, sad, blue, depressed, or hopeless about the future?
- [ ] *never*   *<score 0>*
- [ ] *12+ months ago*   *<score 0>*
- [ ] *4 to 12 months ago*   *<score 1>*
- [ ] *2 to 3 months ago*   *<score 1>*
- [ ] *past month*   *<score 1>*

Em2 - When was the last time that you had significant problems with sleep trouble such as bad dreams, sleeping restlessly, or falling asleep during the day?
- [ ] *never*   *<score 0>*
- [ ] *12+ months ago*   *<score 0>*
- [ ] *4 to 12 months ago*   *<score 1>*
- [ ] *2 to 3 months ago*   *<score 1>*
- [ ] *past month*   *<score 1>*

Em3 - When was the last time that you had significant problems with feeling very anxious, nervous, tense, scared, panicked, or like something bad was going to happen?
- [ ] *never*   *<score 0>*
- [ ] *12+ months ago*   *<score 0>*
- [ ] *4 to 12 months ago*   *<score 1>*
- [ ] *2 to 3 months ago*   *<score 1>*
- [ ] *past month*   *<score 1>*

Em4 - When was the last time that you had significant problems with becoming very distressed and upset when something reminded you of the past?
- [ ] *never*   *<score 0>*
- [ ] *12+ months ago*   *<score 0>*
- [ ] *4 to 12 months ago*   *<score 1>*
- [ ] *2 to 3 months ago*   *<score 1>*
- [ ] *past month*   *<score 1>*

Em5 - When was the last time that you had significant problems with thinking about ending your life or committing suicide?
- [ ] *never*   *<score 0>*
- [ ] *12+ months ago*   *<score 0>*
- [ ] *4 to 12 months ago*   *<score 1>*
- [ ] *2 to 3 months ago*   *<score 1>*
- [ ] *past month*   *<score 1>*

Em6 - When was the last time that you had significant problems with seeing or hearing things that no one else could see or hear or feeling that someone else could read or control your thoughts?

☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em7 - When was the last time that you lied or conned to get things you wanted or to avoid having to do something two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em8 - When was the last time that you had a hard time paying attention at school, work, or home two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em9 - When was the last time that you had a hard time listening to instructions at school, work, or home two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em10 - When was the last time that you had a hard time waiting for your turn two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em11 - When was the last time that you were a bully or threatened other people two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*
☐ *2 to 3 months ago*   *\<score 1\>*
☐ *past month*   *\<score 1\>*

Em12 - When was the last time that you started physical fights with other people two or more times?
☐ *never*   *\<score 0\>*
☐ *12+ months ago*   *\<score 0\>*
☐ *4 to 12 months ago*   *\<score 1\>*

☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em13 - When was the last time that you tried to win back your gambling losses by going back another day two or more times?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em14 - When was the last time that you used alcohol or other drugs weekly or more often?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em15 - When was the last time that you spent a lot of time either getting alcohol or other drugs, using alcohol or other drugs, or receiving from the effects of alcohol or other drugs (e.g. feeling sick)?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em16 - When was the last time that you kept using alcohol or other drugs even though it was causing social problems, leading to fights, or getting you into trouble with other people?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em17 - When was the last time that your use of alcohol or other drugs caused you to give up or reduce your involvement in activities at work, school, home, or social events?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em18 - When was the last time that you had withdrawal problems from alcohol or other drugs like shaky hands, throwing up, having trouble sitting still or sleeping, or you used any alcohol or other drugs to stop being sick or avoid withdrawal problems?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*

☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em19 - When was the last time that you had a disagreement in which you pushed, grabbed, or shoved someone?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em20 - When was the last time that you took something from a store without paying for it?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em21 - When was the last time that you sold, distributed, or helped to make illegal drugs?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em22 - When was the last time that you drove a vehicle while under the influence of alcohol or illegal drugs?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em23 - When was the last time that you purposely damaged or destroyed property that did not belong to you?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em24 - When was the last time that you had significant problems with missing meals or throwing up much of what you did eat to control your weight?
☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em25 - When was the last time that you had significant problems with eating binges or times when you ate a very large amount of food within a short period of time and then felt guilty?

☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em26 - When was the last time that you had significant problems with being disturbed by memories or dreams of distressing things from the past that you did, saw, or had happen to you?

☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em27 - When was the last time that you had significant problems with thinking or feeling that people are watching you, following you, or out to get you?

☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em28 - When was the last time that you had significant problems with videogame playing or internet use that caused you to give up, reduce, or have problems with important activities or people of work, school, home or social events?

☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em29 - When was the last time that you had significant problems with gambling that caused you to give up, reduce, or have problems with important activities or people at work, school, home, or social events?

☐ *never*   *<score 0>*
☐ *12+ months ago*   *<score 0>*
☐ *4 to 12 months ago*   *<score 1>*
☐ *2 to 3 months ago*   *<score 1>*
☐ *past month*   *<score 1>*

Em30 - Do you have other significant psychological, behavioral, or personal problems that you want treatment for or help with?

☐ *no*
☐ *yes (please describe)* _____

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Em31 - When was the last time that you intentionally, or on purpose, self-harmed yourself (for example, cut yourself, burnt yourself, hit yourself, driven recklessly, or abused prescription medication)?

☐ *never*   *<score 0>*
☐ *12+ months ago*
☐ *4 to 12 months ago <orange>*
☐ *2 to 3 months ago <orange>*
☐ *past month <Red>*

Did you know? If you need to talk, we are here to listen. We have a youth peer support workers and youth friendly counsellors available to talk about whatever is on your mind. Our reception team can connect you.

<topic 7> ALCOHOL AND SUBSTANCE USE

AS1 – I have tried vaping, tobacco, alcohol, other types of street drugs, or drugs that were not prescribed to me

☐ *no <green>*
☐ *yes*

If "no" selected, skip the remainder of this section

AS2 - I would describe my use of the following as:

	Never Tried	*Tried a few times*	*Weekend/occasional*	*Regular / daily*	*Former*
Vaping	☐	☐	☐	☐	☐
Weed/Pot	☐	☐	☐	☐	☐
Tobacco (cigarettes, chewing)	☐	☐	☐	☐	☐
Alcohol	☐	☐	☐	☐	☐
cocaine/crack (up, rock, hard) <red>	☐	☐	☐	☐	☐
Prescription medication (if yes, open up three options: 1) painkillers including T3s, and Oxy, 2) sedatives including Ativan, valium, Xanax, 3) stimulants including Dex and Ritalin)	☐	☐	☐	☐	☐

heroin/fentanyl (down, junk, smack) <red>	☐	☐	☐	☐	☐
inhalants (sniffing gas, glue, whippets, cough syrup) <orange>	☐	☐	☐	☐	☐
hallucinogens (LSD, acid, magic mushrooms, mescaline, GHB, ketamine) <orange>	☐	☐	☐	☐	☐
MDMA (ecstacy, EX, molly) <orange>	☐	☐	☐	☐	☐
steroids (growth hormones) <red>	☐	☐	☐	☐	☐
amphetamine (meth, crystal, Jib) <red>	☐	☐	☐	☐	☐
Other (please specify) _____	☐	☐	☐	☐	☐

AS3 - I have tried injecting drugs
☐ *no*
☐ *yes <red>*

Did you know? If you have any questions about drugs and alcohol or would like to talk about how using is impacting you or someone you care about, we can help. You can ask our reception team to see a drug and alcohol counsellor.

<topic 8> HEALTH

He1 - When I'm sick, I get help from (check as many as apply):
☐ *family members;*
☐ *friends*
☐ *hospital emergency*
☐ *walk-in clinic*
☐ *family doctor*
☐ *nurse practitioner*
☐ *emergency services (911)*
☐ *street or outreach nurse*
☐ *outreach worker*

☐ *other (please specify)* _____
☐ *no one*

He2 - I have spent a night in hospital the past year
☐ *no*
☐ *yes <red>*

He3 - Taking care of my health is:
☐ *very difficult <orange>*
☐ *difficult <orange>*
☐ *easy*
☐ *very easy <green>*

He4 - I am currently taking medication
☐ *no*
☐ *yes <red>*

He5 - I worry about my physical health
☐ *never*
☐ *sometimes*
☐ *often <Orange>*
☐ *always <red>*

He6 - I worry about my mental health
☐ *never*
☐ *sometimes*
☐ *often <Orange>*
☐ *always <red>*

He7 - Have you ever been told by a health care provider (doctor, nurse etc.) that you may have (check all that apply):
☐ *fetal alcohol syndrome or spectrum or effects <red>*
☐ *learning disabilities <red>*
☐ *brain injury <red>*
☐ *ADD or ADHD <red>*
☐ *cognitive problems <red>*
☐ *none of these*

He8 - Have you ever had a head injury (concussion, fractured skill, knocked unconscious)?
☐ *no*
☐ *yes <red>*

If "no" selected, skip to H12

He9 - How many times have you had a head injury?

☐ *1* ☐ *6*
☐ *2* ☐ *7*
☐ *3* ☐ *8*
☐ *4* ☐ *9*
☐ *5* ☐ *10*

He10 - When was your most recent head injury?

☐ *one month ago*
☐ *2 to 6 months ago*
☐ *7 months to one year ago*
☐ *more than a year ago*

Skip He 11 if they answered "no" or "thinking about it" to Se2

He11 - The last time I had an HIV test was:

☐ *within last month*
☐ *2 to 6 months ago*
☐ *7 months to one year ago* *<orange>*
☐ *more than a year ago* *<orange>*
☐ *never* *<orange>*
☐ *can't remember/not sure* *<orange>*

Skip He12 if they answered "no" or "thinking about it" to Se2 and/or answered "no" to As4

He12 - The last time I had a Hep C test was:

☐ *within last month*
☐ *2 to 6 months ago*
☐ *7 months to one year ago* *<orange>*
☐ *more than a year ago* *<orange>*
☐ *never* *<orange>*
☐ *can't remember/not sure<orange>*

"Thank you for completing the survey. This information will be used confidentially with you by the staff here at Foundry."

Outcome Rating Scale (ORS)

Name _____Age (Yrs):_____ Sex: M / F
Session # _____ Date: _____
Who is filling out this form? Please check one: Self_____   Other_____
If other, what is your relationship to this person? _____

Looking back over the last week, including today, help us understand how you have been feeling by rating how well you have been doing in the following areas of your life, where marks to the left represent low levels and marks to the right indicate high levels. *If you are filling out this form for another person, please fill out according to how you think he or she is doing.*

ATTENTION CLINICIAN: TO INSURE SCORING ACCURACY PRINT OUT THE MEASURE TO INSURE THE ITEM LINES ARE 10 CM IN LENGTH. ALTER THE FORM UNTIL THE LINES PRINT THE CORRECT LENGTH. THEN ERASE THIS MESSAGE.

Individually
(Personal well-being)

I--I

Interpersonally
(Family, close relationships)

I--I

Socially
(Work, school, friendships)

I--I

Overall
(General sense of well-being)

I--I

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Session Rating Scale (SRS V.3.0)

Name _____ Age (Yrs):____
ID# _____ Sex: M / F
Session # ____ Date: _____

Please rate today's session by placing a mark on the line nearest to the description that best fits your experience.

Relationship

I did not feel heard, understood, and respected. I-- I felt heard, understood, and respected.

Goals and Topics

We did *not* work on or talk about what I wanted to work on and talk about. I-- We worked on and talked about what I wanted to work on and talk about.

Approach or Method

The therapist's approach is not a good fit for me. I-- The therapist's approach is a good fit for me.

Overall

There was something missing in the session today. I-- Overall, today's session was right for me.

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Child Outcome Rating Scale (CORS)

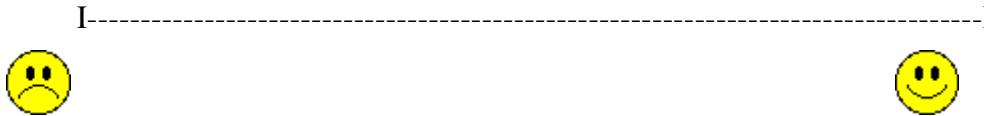Name _____Age (Yrs):____
Sex: M / F_____
Session # ____ Date: _____
Who is filling out this form? Please check one: Child_____ Caretaker_____
 If caretaker, what is your relationship to this child? _____

How are you doing? How are things going in your life? Please make a mark on the scale to let us know. The closer to the smiley face, the better things are. The closer to the frowny face, things are not so good. *If you are a caretaker filling out this form, please fill out according to how you think the child is doing.*
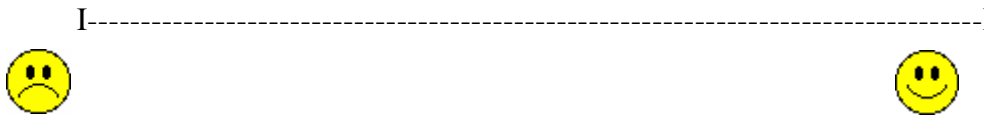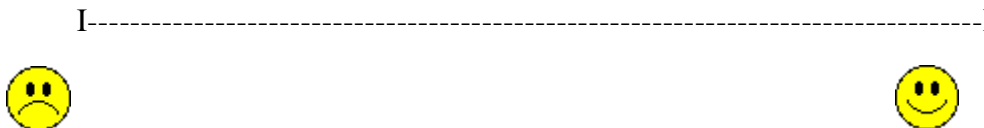
Me
(How am I doing?)

I---I

Family
(How are things in my family?)

I---I

School
(How am I doing at school?)

I---I

Everything
(How is everything going?)

I---I
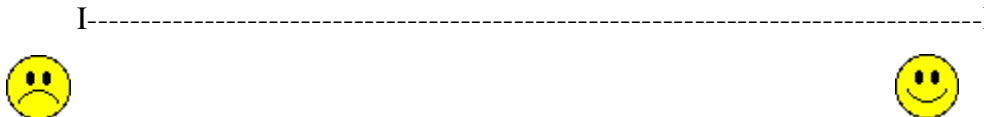
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_____
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Child Session Rating Scale (CSRS)

Name _____Age (Yrs):_____

Sex: M / F

Session # _____ Date: _____

How was our time together today? Please put a mark on the lines below to let us know how you feel.

Listening

_____
did not always
listen to me.

I---

_____
listened to me.

How Important

What we did and
talked about was not
really that important
to me**.**

I---

What we did and
talked about were
important to me.

What We Did

I did not like
what we did
today.

I---

I liked what
we did
today.

Overall

I wish we could do
something different.
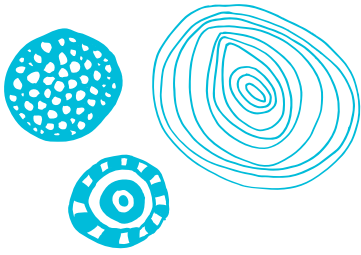
I---

I hope we do the
same kind of
things next time.

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_____

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Research and Innovation