Considerations
when Operating a
Peer Support Service

ARAFEMI Victoria

Centre of
Excellence in
Peer Support

MENTAL HEALTH
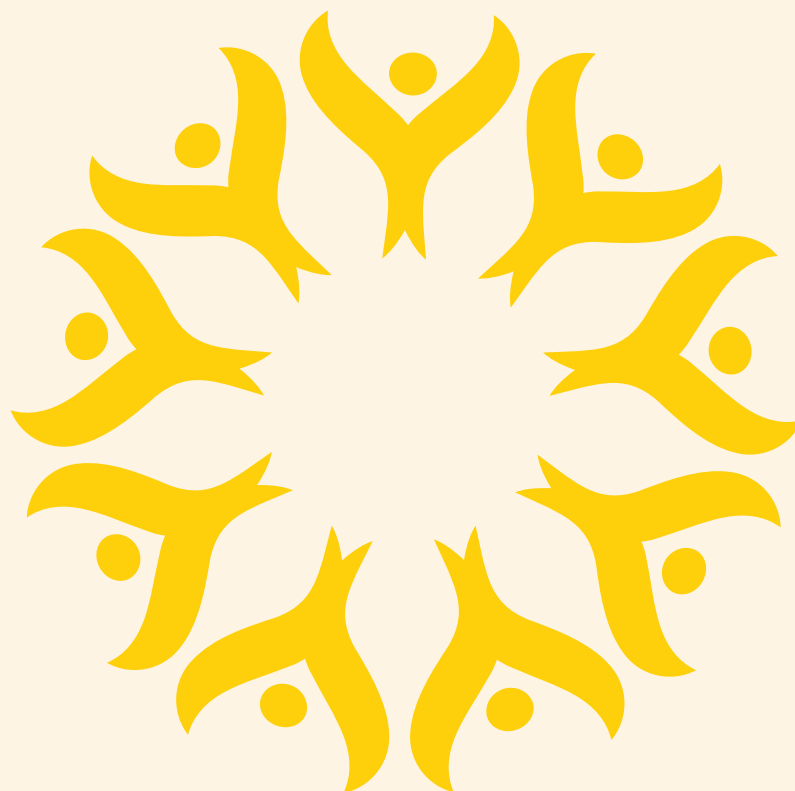
Acknowledgements

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Operating a
Peer Support Service

Your organisation values the contributions of people with a lived experience of mental distress in service delivery, and currently runs a peer support program. This guide is designed to enhance that service delivery to your target group. If you are planning to set up a new peer support service, please instead refer to our guide: *Setting up a Peer Support Service*.

Effective ongoing operations of a peer support service depend upon three key areas: **Governance**, **Evaluation** and **Personnel**. This training module has been segmented into these areas to assist you to access the relevant sections quickly.

Please note, this module is more a set of recommended considerations, than a comprehensive list of instructions – because of the individual characteristics of your organisation and the peer support service you currently run, specific instructions are simply not possible. In addition to reading this manual, we recommend that you also identify and speak with other organisations running similar programs to yours, to further enhance your knowledge around supporting the peer workforce.

Area 1: Governance

Governance covers reporting, policy frameworks, and ensuring your organisation remains sustainable by meeting program objectives and duty of care.

Service objectives

Review the reasons why your organisation originally set up the peer support service. Look back over initial grant submissions, speak with staff who assisted in the implementation of the service, and consumers who may have been a part of the program from the beginning.

- Do the objectives established for it still reflect what is being delivered?
- Is the service reflective of the core values of peer support, and of your organisation's values and mission?
- Do those objectives enable your peer support service to run sustainably? That is, will it still be able to run in 5 years time?
- Do personnel skills and duties, the delivery model, or the target group, etc. need to be refined?

After answering these questions with regard to the program and your organisation, consider whether any service objectives need to change. In doing this, engage your peer workers in the discussions: they will have unique knowledge of the service, as they are the ones directly delivering it. Service users will also be able to provide valuable input.

If it is decided that some things do need to change, it is important to change them formally. Make sure the Executive and all program personnel know about the changes, and understand why they are being implemented. This will help to ensure the ongoing support of everyone involved.

"Develop a service culture which works towards and endorses… promoting peer support as a valued service type in its own right."

The Charter of Peer Support. (2011). Melbourne, Australia: Mutual Support and Self-Help Network.

Reporting

As an established service, you will already know what your reporting requirements are, and how often you need to meet them. If you receive specific funding from a government or benevolence grant, this could include using a report template as defined by an external body. An example of this type of reporting is the templates that PHaMs (Personal Helpers and Mentors) services are required to complete by their funding body, the Australian Government Department of Social Services. Failure to meet such objectives could impact your ongoing funding or endorsement.

In addition, there will be internal reporting requirements that you need to meet. This might include:

- Monthly reports of achievement on agreed milestones
- Budget expenditure updates
- The number of consumers engaged with the service
- Staff performance reports

Sound corporate governance also dictates that each program should provide an annual status report to the Executive – peer support programs being no exception.

Prompt reporting of critical incidents, service user complaints and grievances (as well as positive feedback), and staff feedback should also occur in line with the program and organisation's policies and procedures. Establishing clear processes for responding to feedback from all stakeholders will assist in the ongoing development of your service.

The peak body for your peer support service and other external organisations that you are aligned with, may also appreciate receiving regular updates on the successes and findings of your service. You can further share your experiences by adding reports or a program overview to the Centre of Excellence Peer Support website, and contribute to the development of the peer workforce on a broader scale.

Policies & procedures

All organisations require a full set of internal documentation to ensure standards of service delivery and ethical and legal requirements are met. Ensure your Policies and Procedures are regularly audited, and that your peer support program, as with other programs, follows the documented guidelines. An internal audit schedule conducted every six months is usually sufficient.

Some externally funded programs will require additional, external audits; ensure your program is meeting departmental requirements by running internal auditing at least a month prior to the external review, to enable you to identify any anomalies, and implement any necessary changes. Key areas to check include:

- Volunteer procedures and support
- Occupational Health and Safety
- Security of both personnel and confidential documents
- Cash handling
- Past non-conformance issues
- Critical incidents (and responses) should be checked every six months to ensure no recurrence

Whenever any substantial change occurs within the peer support service, all documentation should be checked and updated if need be. This practice will align your organisation with good corporate governance guidelines. Training of staff and volunteers should be provided in any updates.

Sustainability

Sustainability refers to the long term viability of the peer support program, and will be shaped by a number of factors. These factors include:

- Having a model that is robust, and delivers genuine value to the target group
- Access to a target group that is ongoing, and large enough to justify the program
- A target group that is willing to engage
- Utilising a service delivery mechanism that maintains the health and wellbeing of frontline staff
- Establishing effective support and supervision structures, to maintain the health and wellbeing of staff

How long has your peer support program been running? Has it evolved over time? Will it still be functional in 5 years time, or will it have to change? In asking these questions, consider utilising external expertise to determine whether your service is still providing a delivery model that is consistent with best practice.

The Centre of Excellence website enables ready access to a community of practice with many years of experience, as well as a wealth of current research.

Some general ways to build a sustainable program are to have adequate policies and procedures in place; to employ and manage appropriate personnel, and to imbed improvement processes that seek out, and draw on service users' feedback.

Your staff team is integral to the sustainability of the program:

- Are they still positively engaged in the service delivery?
- Are there sufficient frontline personnel supported by enough administrative resources?
- If volunteers are involved, are enough new recruits being attracted to the service to ensure ongoing survival of the program?

See Area 3: Personnel for further information on how to effectively support your staff.

Duty of care

It is imperative that your organisation continually reviews potential liability issues, in order to ensure the sustainability of your organisation. Some peer support workers may have minimal work experience or formal training in how to support the target group. However, as a representative of the organisation, your organisation is liable for any event that occurs as a result of a peer support worker's actions. Thus, it is essential that you have adequate safeguards in place, to make certain that all personnel understand their roles and responsibilities. This includes adequate policies, procedures, and training to ensure that these procedures are followed.

As a provider of peer support, you will of course also have a duty of care to program participants. It is essential that participants' concerns are handled appropriately, confidentially, and escalated if necessary. This means:

- Providing relevant training for staff and volunteers who work directly with participants
- Embedding processes for appropriate responses/ interventions
- Maintaining regular contact with front line staff
- Ongoing supervision of staff performance
- Having a central storage location for records of any incidents

Organisational hierarchy

Consider whether the peer support service currently belongs to the most appropriate reporting line. Revisit your organisational hierarchy logic – you may have added new services, or closed some programs. This could now mean that your peer support program is either isolated or swamped, and does not have the attention it deserves.

Once again, it is important to speak directly with your peer workforce, and listen to their thoughts and ideas. Consider and discuss their input in the context of best practice models, and the organisational context.

Stakeholder management

It is important to ensure all relevant stakeholders – such as other staff, health professionals, your target group and peak bodies – are fully engaged with the peer support program. Maintaining commitment from stakeholders to support, or at least not attempt to undermine the peer support program, is vital for its sustainability.

It is useful to understand some of the reasons why stakeholders might undermine the group, in order to facilitate open working relationships that will diminish the risk of this occurring. Such reasons could include:

- Other staff may feel marginalised or imposed upon by the peer support program, if sharing of staff or resources occurs;
- Health and allied health professionals are often sceptical of the value of peer support – strengthening their support is best viewed as an ongoing endeavour;
- Your target group may not understand the value of peer support, or appreciate the particular model you have adopted (this can be minimised by embedding participation and feedback strategies in service design from the outset);
- The peak body for your target group may have particular expertise and experience with a range of peer support programs, and may be unwilling to endorse your program to its consumers.

Effective engagement with all these stakeholders will minimise any potential negative impact. The nature of your program, as well as your stakeholders' ways of operating, will help you determine how best to engage them. For example, you may engage stakeholders by:

- Providing regular updates on achievements
- Seeking feedback and input from them
- Incorporating this information into your program design and evaluation process
- Referring program participants to services of stakeholder organisations, where appropriate
- Seconding stakeholder personnel onto the team
- Responding promptly to any concerns raised

Write a list identifying all the key stakeholders in your peer support program. For each of these groups, determine specific engagement strategies based on their unique characteristics.

"…peer support of all kinds only works when there is a spirit of collaboration and partnership. We strongly recommend active and ongoing cooperation between service user groups, voluntary organisations, [and] service providers...to help turn shared vision into concrete practice."

Basset, T., Faulkner, A., Repper, J., & Stamou, E. (2010). *Lived experience leading the way: Peer support in mental health.* London: Together UK.

Area 2: **Evaluation**

Evaluation explores continuous improvement processes, how to ensure participant satisfaction, and viability of the service.

Service evaluation

It is important to maintain robust service statistics. At a minimum, these should include:

- Number of service users by each event or relevant time period
- Type of consumer
- Frequency of usage
- Length of time that consumers participate

These core statistics will enable you to analyse your model, and determine whether it needs to be altered. Costs incurred from the service also need to be monitored, to ensure best value efficiency is occurring.

Qualitative evaluation should also be conducted – this can be done via feedback forms, offered to group members regularly. Reviewing this data to identify any common themes will reveal important information about the effectiveness of the program. It is worth remembering, however, that one mistake or service user complaint may not be evidence of a need to overhaul the whole program. If several members share the same thoughts about a particular aspect of the program, then it could be beneficial to consider altering your model in response.

Deciding whether or not to implement any such changes may be an item for discussion at formal 'users' group' feedback sessions. These can provide valuable insight if held regularly – twice yearly is a typical frequency.

Also seek out and monitor the feedback of peer support workers delivering the program. They can advise if the program needs adjustment, based on their direct relationship with the service users.

Drawing upon all the data mentioned in this section, a formal review of the peer support program and whether it is meeting its objectives should be conducted annually. Table these results for reporting to the Executive level.

Researching other services

As part of the annual service review, it is worthwhile to look into other existing services for your target group, both locally and elsewhere. For instance, a new program may have been introduced nearby which could lead to 'over-servicing' for people in your area. In scoping other similar services, you may also be able to identify ways in which your organisations can work collaboratively to best cover gaps in service delivery.

Check with the relevant peak body as well as local allied health care professionals to ensure your service delivery model is still meeting the needs of your target group; you can also discuss current best practice peer support models with them, and any new developments in this area that may be of interest to your organisation.

"Peer working is a complement to both informal peer support and services provided by a range of different organisations and agencies...Peer support and recovery focused practice are underpinned by common sets of values that guide and inform their approaches."

Experts by experience: Values framework for peer working. (2012). Glasgow, UK: Scottish Recovery Network.

Budget review

Annual budget formation requires careful evaluation. Consider coverage of administration and supervision costs, as well as accommodation, travel, and room hire or occupancy costs. Promotion, documentation, insurance and legal fees should also be included.

- Have the funds allocated been adequate to meet the needs of the program in the last twelve months?
- Will they be sufficient for the next twelve months?
- Perhaps additional staff or training is required – you may have added more sessions per week, or more call operators? These will incur more expenses and must be accounted for.

If you require more funding, you will need to include a justification for this. Your rationale for extra money can be strengthened by including current research on the effectiveness of peer support, and particularly the model you have adopted. If an expansion is in mind, demonstrate why this is necessary in your application for new funds. Have participants requested this? Or have program staff consistently observed a greater demand for services?

As many peer support services are provided in a not-for-profit environment, securing an additional allocation of funds may mean that much needed funds have to be taken from other worthy programs. Can you cut back in some areas to reduce the amount of extra funding you require? Alternately, is there an opportunity to seek additional funding externally, from a grant or government scheme? Include all these considerations in your submission to the Board of Management.

Area 3: **Personnel**

The area of personnel looks at considerations for paid staff and volunteers, and the structures essential to enabling their effective, ongoing delivery of services.

Management of staff

All personnel involved in your organisation's peer support program should report regularly to the program manager, and they should receive appropriate supervision and assistance to enable high performance. In terms of best practice peer support, appropriate supervision involves access to peer-led co-supervision. If your organisation does not employ experienced peer workers to provide this role, it is highly recommended that external peer supervision be sought to strengthen practices of peer staff This also includes any volunteers involved in peer support delivery.

Where your staff or volunteers have a lived experience and are on their own recovery journeys, it is especially important to ensure they feel competent and supported to support others at all times. Flexible working hours and confidentiality are specific issues to consider. Particular policies and procedures may be necessary to cater for this group, however, be careful not to give rise to discriminatory practices. For example, if your organisation is planning to implement workplace 'wellness plans' for peer workers, consider instead why these should not be offered as an option to all staff. It is important to support workplace wellness for all employees, irrespective of the disclosure of a lived experience.

At times it is necessary to terminate employment, or a staff member leaves. Ensure your policies and procedures are up-to-date, and that your staff and supervisors understand the relevant processes. This includes disciplinary action procedures, and handling grievances. Also be sure to establish thorough handover procedures, so that the organisation does not lose the valuable experience and knowledge the staff member developed while in their position.

"The organisation should provide information to supervisors on how they can support an employee who is off work or returning to work after sick leave due to a mental health problem."

Helping employees successfully return to work following depression, anxiety or a related mental health problem: Guidelines for organisations. (2011). Centre for Youth Mental Health, University of Melbourne.

Recruiting personnel

Before you commence looking outside to recruit new staff, review your existing staff and pool of volunteers.

- Are any of them interested in expanding their skill base?
- Is anyone within the organisation looking for a change of job role?
- Could you partially second someone into the peer support program?

If there is an appropriate match, this can be an efficient way to introduce organisational experience and fresh ideas at the same time. Internal staff recruitment also substantially reduces training and induction requirements.

Staff who work or interact with those with a lived experience must appreciate the sensitivity around disclosure issues. It is the responsibility of the organisation to ensure that appropriate privacy guidelines are in place, understood, and followed. It is also important to be flexible in the hours that you expect your peer support staff to work. They may have mental health issues or care responsibilities which impact their ability to work regular hours – be clear in what the organisation expects of staff, and provide a concise Position Description that reflects this.

To assist your organisation in gaining clarity around these considerations, it is a good idea to undertake some further reading. See the Centre of Excellence in Peer Support website, as well as the references quoted throughout this training module, for more information. Additionally, you can gain valuable knowledge by talking to colleagues in other organisations about their practices in regard to supporting peer workers. Along with the Position Descriptions for peer roles, make sure your organisation's practices are accurately reflected in the relevant policy and procedure documents.

Training needs for personnel involved with a peer support program should also be reviewed on an individual basis. In particular, the Certificate IV in Mental Health Peer Work was endorsed in 2012, and could be useful for supporting skills development and career progression.

"…It is important that peers have jobs in which they can use the skills they have acquired through their life experiences and training, rather than being assigned tasks that other staff are simply too busy to perform…"

Davidson, L., Bellamy, C., Guy, K., & Miller, R. (2012). Peer support among persons with severe mental illnesses: A review of evidence and experience. World Psychiatry, 11(2): 123-128.

Volunteer management

Peer support models often have volunteer delivery components. They are very useful in expanding the staff resource base, and can assist volunteers in their own recovery process: volunteering can be a great first step in returning to the workforce. In this way, it is important to consider how best to support your volunteers in their personal goals and reasons for volunteering.

Utilising volunteers does have organisational implications. Managing and directing staff that do not have a financial incentive to participate can be problematic. Their supervisors should be mindful of this, and have appropriate policies and procedures in place to support their practice. If the incentive to work for the organisation is not a monetary one, then what is motivating volunteers to participate? What are they hoping to get out of their work – and, how does the organisation support this?

You will also need to consider performance agreements with volunteers, standards of behaviour, and liability issues – given volunteers acting for your organisation are regarded as legal representatives, your organisation will be liable for any misdemeanour.

Utilising concise and specific Position Descriptions or Statements of Activity will help clarify everyone's roles, and what is expected or not expected of them. Providing adequate training will also minimise potential risks.

Even with all the best recruitment and support processes in place, the need for termination of volunteers may still arise, and can be especially problematic. Sometimes the role is simply not a good fit, or the volunteer does not have the sufficient time, skills or ability to commit to the performance levels your peer support service requires. In such cases, you may need to terminate their voluntary position.

If you have a Position Description or Statement of Activity in place, then it should be clear where a mismatch exists. You should also have termination and resignation guidelines included in the formal Volunteer Agreement – this will streamline the process, making things easier for both parties. However, before you decide to separate them from the organisation entirely, do consider whether there is another position they may be more suited to fulfilling. Perhaps the peer support role is not appropriate, but other roles may be a much better fit.

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