



Considerations when **Setting Up** a Peer Support Service

ARAFEMI Victoria



Centre of
Excellence in
Peer Support

MENTAL HEALTH



Acknowledgements

The Centre of Excellence in Peer Support would like to kindly thank the following people and organisations for their contribution to the development of this training module:

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ARAFEMI Victoria, Inc.
The Compassionate Friends
Eating Disorders Victoria
Post and Antenatal Depression Association (PANDA)
Anxiety Recovery Centre Victoria (ARCVic)
Grow
Action on Disability within Ethnic Communities (ADEC)

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Operating a Peer Support Service

Following extensive analysis, your organisation has determined that a new peer support service will enhance outcomes for your target group.

This training module is intended as a set of recommended considerations, rather than a comprehensive list of instructions. Because your organisation and its individual circumstances will dictate specific variations that are outside the scope of this document, it is not possible to predict all those variations and cater for them here. There is, however, one universal recommendation for establishing new peer support services: be sure to engage your own existing service users and peer workers in every stage of service planning, design and delivery.

To assist you in gaining clarity around all necessary considerations of setting up the new service, it is a good idea to undertake extensive further reading. See the Centre of Excellence in Peer Support website, as well as the references quoted throughout this training module, for more information.

In line with peer support guiding principles, you can help by adding your experiences and information to the growing body of peer support knowledge and practice. Please document the process of setting up your service, and once established, upload your findings to the Centre of Excellence website for others to use as a resource.

Establishing a new support service progresses through four distinct stages: **Planning**, **Setting Up**, **Commencing Operations** and **Monitoring**. This training module has been formatted in this way to help you quickly access the most relevant sections.

Stage 1: Planning



Stage 1 is about planning the peer support service, and what it will offer. Investing time and resources in planning the service will provide a strong foundation upon which it can continue to successfully operate in years to come.

Objectives of the service

Start by considering why the organisation is planning to set up a new peer support service. Arrange a meeting for discussion between key stakeholders within the service, aiming to arrive at a clearly articulated set of objectives, and the reasoning behind them. Questions for discussion may include:

- Have funding opportunities to establish new peer support programs been a motivator?
- Is it based on feedback or suggestions from current services users?
- Has an informal version of the proposed program been operating for some time amongst consumers?
- How did this evolve?
- Is your organisation aiming to formalise these arrangements?
- Is the new service in response to the growing body of research that shows peer support can be very effective in assisting recovery?
- Have a combination of these factors influenced establishment?
- What are the other reasons for the new service?

Whatever the reason, defining a clear set of objectives for the new service will greatly enhance its chance of success. Write down clear statements that show what you expect the service to deliver in the first twelve months, and in five years' time.

- How many people will it assist?
- What is the target group?
- How will you know if it is being successful?
- Under what circumstances would you wind it up?

"It is fundamental to include a wide range of opinions and views...creating a planning group that includes people with experience of using services is not only expected practice in any new service development, but also in keeping with the underlying values of peer working..."

Smith, L., & Bradstreet, S. (2011).
Experts by experience: Guidelines to support the development of Peer Worker roles in the mental health sector.
Glasgow, UK: Scottish Recovery Network.

Research

Conduct research into existing services for your target group, as well as their willingness to engage with peer support models. If they are already well served by other peer support services, then invest your money and efforts in other ways to enhance their recovery journey. There may be an informal group operating in your region that you can assist, or a nearby one that can be expanded to support your target group.

Check with the relevant peak body, the Centre of Excellence in Peer Support and local allied health care professionals, to ensure there is no unnecessary duplication; you can also canvass peer support model options with them. Similar programs may have been established within other services – if you can still identify that a new service is worthwhile and feasible to introduce in your organisation, be sure to seek input from those that have had experience in implementing comparable programs. They could be able to provide you with some valuable suggestions.

The peak body for the target group should also have relevant expertise and information about effective models. Above all, don't forget to engage your own existing service users in planning how the service will function. This input can be gathered via surveys, complimentary working groups, structured consultations and informal feedback.

Funding

The peer support model you choose to adopt will determine how much capital and ongoing expense will be required. Dependent on your model, expect to have to cover:

- Promotional and set up costs
- Documentation
- Administration and supervision
- Training requirements
- Salaries
- Travel
- Room hire or occupancy
- Refreshments
- Insurance and legal fees

How will the organisation fund the service? If you have significant surplus income, this may not be an issue beyond gaining approval to fund the new venture from your Board Executive or Committee of Management. In other cases, you will most likely need to apply for additional funding from benevolent fund grants, special government projects or other external sources.

It may also be worthwhile to consider opportunities for linking with other peer support service providers, particularly if you are able to identify a service that upholds similar values to your own organisation. Forming such partnerships could reduce establishment costs, for example, in accessing existing training and development programs rather than creating new ones from the start.

In completing a funding application, consider including reference to current research on the effectiveness of peer support – there is a growing body of evidence available to enhance your justification of a new peer service. Also, remember to follow the submission guidelines closely to increase the likelihood of acceptance. Where possible, utilise staff that are highly skilled in grant writing to ensure a successful outcome.

Organisational integration

How are you going to best incorporate your new service into the existing organisational infrastructure? Especially in the early stages, a peer support service can be quite labour intensive. What position/s will be responsible for ensuring its success? How will the required resources be drawn from amongst existing departments?

The model you choose will influence these decisions. For example, if a network of volunteers will provide the peer support, then the Volunteer Coordinator may be the logical program manager; if support is to be provided online or over-the-phone as an adjunct to counselling, then the Counselling Coordinator may be appropriate; or, if peer support is to be part of formal training or workshops, then the Training Manager may be most relevant.

Whatever the model adopted, really focus on the role of the manager in facilitating success for the service. Recruiting key personnel can reduce interpersonal and role conflicts, and optimise crucial outcomes in the establishment phase. The willingness of individuals to take on the service may also be positively influenced by the right manager.

Executive support


The support of your organisation's executive officers is vital to successfully launching the service. The executive have the authority to release funding and personnel, and approve new ventures. If the new venture appears to be faltering and they do not appreciate its value, then they also have authority to require its termination.

Prepare a comprehensive analysis report that presents a strong argument for the introduction of the new peer support service. Include:

- Research and facts to support your case
- Costing
- Funding options
- Infrastructure implications
- Sustainability aspects

It may well be worth running a trial or pilot program first; it is often easier to gain acceptance for a short term venture, due to the lower risk in terms of capital and time required. If it proves successful, then executive support for the ongoing program should much easier to gain.

Whatever approach you choose to take, consider identifying a champion on the executive who will speak on your behalf in supporting the new service. Lastly, expect it to take some time to receive final approval.



“Any one of us could be affected by an unexpected life event or illness where peer support will be vital to our recovery and well being... Peer support should be accessible to all who need it.”

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

Stage 2: **Setting Up**



Proceeding with the new service following planning and approval, stage 2 involves first defining the operations of the service, then integrating this within broader organisational structures.

Policies & procedures

Any new venture requires a set of internal documentation to ensure standards of service delivery, ethical and legal requirements are met.

Many of your existing organisational policies and procedures will likely be of relevance to the new peer support service. However, these documents may require that some items be added or altered to ensure conformance. For example, if your model includes volunteers running small groups, they will likely need access to petty cash to purchase tea / coffee for consumers; thus, there would have to be a section on non-employees handling petty cash. Occupational Health and Safety should also cover volunteers' activities. If your model includes outreach and visits to target group residences, then adequate security protocols including risk management assessment and strategies will also need to be in place.

To ensure sound corporate governance, all documentation should be finalised prior to the new peer support service commencing.

Recruiting personnel

Whilst your organisation may already have sufficient staff resources to commence the peer support program, it is likely you will have to recruit specialist personnel, including those with a "lived experience". This will have particular implications for your organisation, especially where lived experience positions are not already a part of your staffing structure.

Personnel who work or interact with those with lived experience must appreciate the sensitivity around disclosure issues and ensure appropriate privacy guidelines are in place and are followed. It is also important to be flexible in the hours that you expect personnel to work. They may have mental health issues or care responsibilities which impact on their ability to work regular hours. Be clear in your expectations, and provide a concise Position Description. You should also embed these considerations in the Policies and Procedures.

Training needs for staff involved with a peer support program should also be reviewed. A nationally accredited Certificate IV in Mental Health Peer Work has recently been developed which could be useful for assisting career progression, and there are also a number of other highly regarded peer support training programs available to develop skills in both new and experienced workers.

"Flexible working options are probably the most effective strategy for meeting the workplace needs of workers with mental illness."

Workers with mental illness: A practical guide for managers. (2010).
Sydney, Australia: Australian Human Rights Commission.

Management structures & supervision

Ensuring an appropriate organisational hierarchy will enable the new peer support service to operate effectively. While many stakeholders across the organisation may be very interested in the success of the new peer support program and its impact on service delivery, one designated manager should be responsible for achieving the defined objectives of the program. Having the responsibility for the peer support program tied to a particular role, rather than a person, will ensure its sustainability. Thus, if there has been a project champion, when they leave the organisation (as eventually happens) the program will continue under the new incumbent, as its success is tied to their Position Description – and not an individual's level of enthusiasm.

All personnel involved in the peer support program should report regularly to the program manager, and they should receive appropriate supervision and assistance to enable high performance.

Given the nature of the target group and peer support, it may also be beneficial to arrange regular external supervision of peer workers to ensure ongoing skill development. In particular, peer-led supervision or 'co-supervision' is uniquely valuable in maintaining the integrity of the lived experience perspective, and strengthening the peer workforce. This is a consistent recommendation in much of the literature and research into peer support work and models of best practice.

Role of volunteers

Peer support services often have volunteer delivery components. They are very useful in expanding the personnel resource base and in assisting volunteers in their own recovery process.

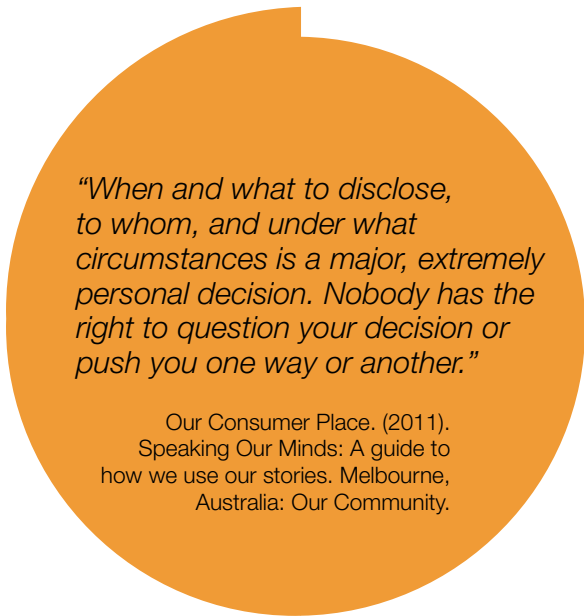
Utilising volunteers does have organisational implications. Managing and directing staff that do not have a financial incentive to participate can be problematic. Thus, their supervisors should be cognisant of this and have appropriate policies and procedures in place to support their practise. If the 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.

Handling information – privacy implications

As with any program, appropriate service provision requires access to some personal information. With peer support, much of that information can be very sensitive. As such, appropriate policies and procedures should be developed and referenced to cover the collection, use and storage of any such information. Training in standard confidentiality practise should include all new staff involved in the peer support program, including any volunteers.



“When and what to disclose, to whom, and under what circumstances is a major, extremely personal decision. Nobody has the right to question your decision or push you one way or another.”

Our Consumer Place. (2011).
Speaking Our Minds: A guide to
how we use our stories. Melbourne,
Australia: Our Community.

Engaging stakeholders

All new ventures can be risky, and have a level of uncertainty. It is important to ensure key stakeholders are fully engaged and support the program. Gaining commitment from stakeholders to support, or at least not attempt to undermine the new service, is vital for its sustainability.

Why would stakeholders undermine the group?

- Other staff may feel marginalised or imposed upon by the new peer support program
- Health and allied health professionals may regard peer support as unnecessary
- Your target group may not understand the value of peer support, or appreciate the particular model you are adopting
- The peak body for your target group will have particular expertise and experience with peer support programs that you are not familiar with, and may be unwilling to promote or endorse your program to its consumers

Effective engagement with all these stakeholders will minimise any potential negative impacts. Engage stakeholders by:

- Keeping in close contact with them on progress
- Seeking input and/or feedback from them
- Incorporating this information into your program design
- Seconding stakeholder personnel onto the development team
- Responding promptly to any concerns raised

Liability issues

To ensure the sustainability of your organisation, you must consider all potential liability issues prior to establishing your new peer support program. Peer support workers can often have minimal or no formal training in how to support and / or counsel the target group. However, as with all staff that represent your organisation, your organisation is liable for any event that occurs as a result of their actions. It is essential that you have adequate safeguards in place to ensure all staff understand their roles and responsibilities. This includes sound policies and procedures, and the training and support to ensure they are followed.

Stage 3: Commencing Operations



Stage 3 explores the initial establishment phase, and getting started with the day to day running of your peer support service.

Promoting the new service

Before your first peer support session, you will need to advise potential clients of the new offering. You will probably already have a list of clients from your target group who are aware of its forthcoming launch. They will just need to be contacted and provided with details about how, when and where to access the service. This may mean telephones calls, or sending out an (email) invitation.

Beyond the initial announcement to interested participants and other organisations, there are a range of options for promoting your peer support program. Which ones you choose will largely be determined by the nature of the model you have adopted, your target group and your budget. Promotion could include:

- An official launch event with all stakeholders invited as guests
- Press releases to specialist, local or regional media outlets
- Conducting information sessions
- Direct notification to stakeholders such as local allied and health professionals, relevant peak bodies, and the local council
- Notices in community houses, libraries, and shopping centres, in fact anywhere where your target group may frequent
- Updating your organisation's website

Networking is an essential part of promotion. This may involve key representatives from your organisation attending relevant forums or meeting with other figures and organisations – such as consumer advocates, the Department of Health, or other mental health service providers. Directly promoting the new service and what it will offer the target group can be very effective in garnering interest and support.

Simulations or workshops of how the program will work can be held for interested stakeholders. This will give them valuable insight, and they will be more willing to recommend your new service. You can also offer a trial session for service users, so they can see if they like the format before having to commit.

Don't forget to promote within your organisation as well. It is good to keep staff informed of the progress of your new program – they may be interested for a number of reasons, and it is also likely your existing employees have connections with people from your target group.

Whatever methods you use, promotion is vital to the success of your program, especially in the short term. Allocate as much of your time and budget to it as you can, and actively seek assistance from your executive.

Practical housekeeping

Depending on your peer support delivery model, there will be some practical day-to-day requirements for running your program.

Are you going to be...	Then don't forget to think about...
 <p>...Running workshops or sessions?</p>	<ul style="list-style-type: none"> • booking the required rooms with plenty of notice • ensuring a support or co-facilitator is trained and present • ensuring there are adequate toilets, parking, disability access • providing tea, coffee, refreshments & serving facilities • outlining a clear structure for the sessions, incorporating flexibility based on group needs • pens, paper, photocopies, printed resources • your whiteboard & projection presentation needs • the tables, chairs and room layout – this can have a big impact on group dynamics, so plan ahead • ensuring relevant police or security personnel have been advised
 <p>...Utilising volunteers?</p>	<ul style="list-style-type: none"> • providing clear position descriptions, policies & procedures, and recruitment criteria will need to be in place • ensuring appropriate volunteer training, support and debriefing processes are in place • clarifying the points of contact and support for your volunteers • ensuring the Program Manager attends, initially at least. They can ensure there is a smooth set up, respond to questions and assist if any unforeseen need arises
 <p>...Launching an online or over the phone service?</p>	<ul style="list-style-type: none"> • the required technology and hardware that should be in place. Ensure everything is trialled well ahead of launch • providing clear guidelines as to the terms and conditions of use, for both facilitators and users • having easy to understand, comprehensive policies & procedures on how to use the service • making a plan and identifying where you can go for technical assistance if help is needed
 <p>...Aiming for success, with any peer support model?</p>	<ul style="list-style-type: none"> • keeping an adequate record of service users & expenses • recording significant progress, outcomes & highlights • meeting all internal procedural requirements • evaluating the success of the service & celebrating your achievements along the way • Maintaining close contact with the Executive on progress, especially in the early stages

Engaging with the target group

For your program to be successful, you must ensure your service meets the needs of the target group, and that they recognise the value it provides. For ongoing success, you can do this via regular feedback sessions. To start off, an open dialogue with selected target group members is recommended to proof the model.

As peer support involves assisting people in their recovery journey, maintaining boundaries is essential. Peer support service consumers can be very vulnerable and may become overly dependant. Whilst professionals are trained to recognise and deal with this, sometimes non-professionals (including volunteers) can become too close to the service consumer, causing them to lose objectivity or the ability to be an effective support. The Program Manager should guard against this by:

- Maintaining close contact with front line staff
- Meeting all supervision and training needs
- Having adequate guidelines and procedures in place to support staff
- Managing any other issues that arise.

Sustainability

Sustainability is about ensuring the long term viability of the peer support program. Factors that will affect sustainability include:

- A model that is robust
- A model that delivers real value to the target group
- Ongoing access to a target group that is large enough to justify the program
- A delivery mechanism that maintains the health and wellbeing of frontline staff
- A target group that is willing to engage

Some general ways to build a sustainable program are to have sound policies and procedures in place; to employ and support suitable staff, and to have in-built improvement processes that draw on service users' feedback. There are also a number of things that organisations can do, particular to peer support programs, to increase the likelihood of ongoing success.

Greater sustainability can be achieved by accessing the peer support community of practice to ensure current research informs all decisions. Many organisations have been successfully running peer support programs for decades, and can provide valuable insight. There is also a growing body of research and resources that can assist in program development and operation, particularly in the area of mental health peer support.

Stage 4: **Monitoring**



Stage 4 looks at embedding evaluation and improvement processes into your peer support service – this is crucial to sustainability.

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. For example, sessions held on Tuesday mornings may be much better attended than Wednesday evening sessions. In this case, you might want to consider trialling a Wednesday morning session and dropping the Wednesday evening. 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.

“A Peer Worker helps others... discover their own strength and resilience, supporting them in achieving their goals and developing autonomy and independence.”

Employer Toolkit: Employing peer workers in your organisation. (2009). Adelaide, Australia: Baptist Care (SA) Inc. & MIFSA Peer Work Project.

Reporting

If you have received specific funding from a government or benevolent grant scheme, then there may also be specific requirements in reporting that you need to meet. This could include reporting on:

- Achievement of agreed milestones in budget expenditure
- Number of service users engaged by a pre-determined time
- Recruitment of new staff

It is essential that the Program Manager ensure all reports are completed as required. Failure to meet objectives such as the ones outlined above could impact on your ongoing funding or endorsement – if this is the case, contact the funding body as early as possible to inform them of setbacks. Your reports can outline why the specified targets were not able to be achieved on time. Executive supervision may also be appropriate.

Any critical incidents should be reported on in a timely manner; establish sound continuous improvement protocols to ensure no reoccurrence.

Good corporate governance dictates that each program should provide an annual status report to the Executive. Peer support programs are no exception. In fact, having gained Executive support to commence the new venture, it is important to keep them informed of its progress.

The peak body for your target group, and other key stakeholders, may also appreciate receiving a regular report on the success and findings of your program.



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