



**NEAMI CONSUMER  
WORKFORCE WORKING  
GROUP**

**FINAL REPORT**

**JANUARY 2012**

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## Acknowledgments

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I would like to acknowledge the commitment of the working group members and their practical and enthusiastic approach to their tasks, despite the many other demands on their time and the complexity of some of the issues. Together we found a good pathway to the recommendations in this report which offer a solid foundation for the continued employment of people with lived experience of recovery within Neami's workforce.

Merrilee Cox, 4 January 2012

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## 1. BACKGROUND

Neami commenced the employment of Peer Support Workers in March 2010 in its PHaMs funded sites. Eleven workers started and were introduced to the Flourish program as the primary responsibility of the role. Later in 2010 the Way2Home service employed four peer support workers to support engagement with people sleeping rough in inner city Sydney. Following the success of these initiatives Neami has now made a commitment to introduce peer support workers at all service sites as financial and service delivery considerations allow. The Service Development team now includes 'lived experience' as a desirable criteria for all positions in the team.

In September 2010 a forum of peer support workers, their managers and other staff reviewed the implementation of peer support work at Neami and agreed to establish a working group to review the Peer Support Worker position description and support (supervision, management, etc.) arrangements at Neami. The key tasks for the group were identified and the terms of reference were established (see attachments)

At the first meeting of the group, in recognition of the range of roles in which lived experience of mental illness and recovery could be a criteria, the terms of reference were amended to name the group the Consumer Workforce Working Group. It was also decided at that meeting not to pursue consumer membership of the group due to the short time frame of the project. The working group split into four sub-groups working on the practical tasks and met monthly to review progress and discuss the issues emerging. Members reviewed literature from a wide range of local and international sources and in some instances conducted research into issues to ensure that they were well-informed about their areas of focus.

Meetings were held over the phone and in two face to face sessions. There were some thorny issues to be worked through and group members managed to find solutions to most of these. Participation was strong and consistent.

This report provides a brief summary of the discussions in relation to each of the tasks delegated to the group and the final recommendations. In the course of the work associated with this project other issues arose and these also will be summarised and suggestions made as to how to respond. Prior to finalisation the draft report was distributed to all Peer Support Workers and some of their suggestions were incorporated into the final draft.

## 2. SUMMARY OF RECOMMENDATIONS

The recommendations below were developed and endorsed by the working group. Further discussion about these areas is contained in subsequent sections. The group recommends that:

1. The updated elements of the Peer Support Worker position description are referred to the Recruitment Working Group for finalisation
2. The Neami Code of Ethics is updated to include considerations relating to self-disclosure and advocacy (Section 3.2 for specific wording).
3. Self-disclosure guidelines are adopted by Neami; are attached to the current Code of Ethics and included in the Manager Handbook; and promoted through inclusion on the orientation checklist, at induction, and through discussion in supervision (Section 3.3).
4. The Manage Your Health at Work Plan is implemented for all staff (Section 3.4).
5. Develop skills of managers in supervision of peer support workers (Section 3.5 for elements)
6. Develop skills of Peer Support Workers and ensure there are structures in place to support their specific learning and development needs. (Section 3.5)
7. Training in advocacy for all staff is included in the Learning and Development Framework.
8. Build awareness and support for the role of peer support workers across all levels of the organisation.
9. Peer support work is integrated into planning, reporting and evaluation activities.
10. Ongoing reflection and evolution of the peer support work role
11. A consistent description of the role of Peer Support Workers, emphasising lived experience of recovery, is used in Position Descriptions, on the web site and other documentation (see attachment).
12. All Neami position descriptions include an access and inclusion statement that emphasise the value Neami places on diversity in its workforce.
13. Managers refer to the Peer Support Worker Salary Criteria and consult with HR when determining an appropriate level/band for appointments to ensure there is a consistent approach across the organisation.
14. The classification of Peer Support Workers is included in the next Neami National Employment Agreement discussions.
15. The findings of the Working Group are widely disseminated to consumers for their feedback.
16. The Service Development team develop an evaluation project to explore consumer experience and perception of the value of the role of Peer Support Work to consumer recovery.

### 3. CONSUMER WORKFORCE WORKING GROUP OUTCOMES

The introduction of Peer Support Workers at Neami followed considerable research consultation and discussion to ensure the approach was evidence based and would result in good outcomes for both the PSWs and consumers. The key elements of an effective system were found to be a clear, consistent and distinctive role and training, support and supervision structures. The introduction of peer support work also coincided with the introduction of the Collaborative Recovery Model and it was decided that the main focus of the PSWs should be the facilitation of Flourish, a peer-facilitated self development program based on the CRM. Peer Support Workers were employed in each of the PHaMs funded services (with the exception of Wollongong) in March 2010.

Later that year Neami was successful in attracting funding to support two outreach programs to people sleeping rough. It was decided to employ peer support workers in these programs to support the engagement of consumers within the service. This was quite a different role to the previous group as these workers go out on ‘street patrol’ to make contact with clients and assist in the process of linking them in to housing and support.

Following the release of the Consumer Participation and Leadership Project report at Neami, the Service Development Team made a decision that ‘lived experience’ would be considered a desirable attribute for all positions in the team and has successfully recruited a Training Officer and a number of Project Officers.

This section of the report addresses each of the Terms of Reference of the Working Group and contains the recommendations developed by the group following consideration of the issues.

#### 3.1. REVIEW THE PEER SUPPORT WORKER POSITION DESCRIPTIONS WITHIN NEAMI TO ENSURE THEY REFLECT THE EVOLUTION, DISTINCTIVENESS AND RANGE OF THE ROLES

The group reviewed the relevant elements of the position description to reflect the way the role has developed at Neami. These revisions highlight the roles that peer support workers play at Neami, identify the skill sets for both the outreach and facilitator aspects of peer support work roles, and articulate the key selection criteria.

During the life of the Consumer Workforce Working Group another working group was formed to review the recruitment processes at Neami. The primary focus of that group has been the Community Rehabilitation Support Worker positions but over time the work of that group will impact on the way that all positions are described and the articulation of key selection criteria.

As a result the group decided to refer the revised position description to the Recruitment Working Group to take it the next step. This will involve translating the skill requirements and selection criteria into competency based language. It is proposed that the Recruitment Working Group consult with Peer Support Workers and managers again prior to finalisation.

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#### RECOMMENDATION 1

The updated elements of the Peer Support Worker position description are referred to the Recruitment Working Group for finalisation (see Attachment 3)

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#### 3.2. REVIEW NEAMI CODE OF ETHICS TO ENSURE IT IS INCLUSIVE OF CONSUMER WORKER POSITIONS

The Staff Code of Ethics was reviewed and it was felt that it was sufficiently inclusive to apply to the consumer workforce. It was proposed to add an additional clause relating to 'Use of self' under the heading of Professional Conduct and another under the heading of Consumer Empowerment. The revised Staff Code of Ethics is attached to this report.

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#### RECOMMENDATION 2

The Neami Code of Ethics is updated to include the following considerations relating to self-disclosure and advocacy

- An additional item "Use of Self" is included in the Neami Code of Ethics under the Professional Conduct heading (see Self-Disclosure Guidelines).

*"Staff will use a considered approach in sharing information about their personal lives or their experience of recovery"*

- An additional item is included in the Neami Code of Ethics under the heading Consumer Empowerment

*"Staff will support consumer self-determination and the right to advocate on their own behalf"*

### 3.3. PERSONAL DISCLOSURE GUIDELINES FOR ALL STAFF

Unlike other workers in Neami, Peer Support Workers and other members of the consumer workforce are employed on the specific understanding that they will use their lived experience of recovery in their work. This raises challenges about the expectations on these workers, concerns about the potential for trauma due to continually revisiting stressful events and the maintenance of personal and professional boundaries in the workplace.

Discussion on this issue recognised that appropriate disclosure is a challenge for all staff and that whilst this issue is heightened for peer support workers or other staff expected to use their lived experience in their work, the approach to disclosure is universal.

It was also noted that some peer support workers had felt pressure to disclose personal information in order to gain legitimacy in their roles. All staff should be encouraged to respect their colleague's rights to privacy and ensure that questions of a personal nature are welcome and non-intrusive.

Discussion centred around the importance of safety for all parties and the importance of disclosure being focused on the process of recovery. The group developed disclosure guidelines which it is anticipated will be explored through orientation and at induction. Overall, the document is to be seen as a resource to help manage the 'greyness' sometimes present in working relationships. It was noted by members that the document is not just applicable to working with consumers, but is also relevant in the training and office environment.

### RECOMMENDATION 3

Self-disclosure guidelines (Attachment 5) are adopted by Neami; are attached to the current Code of Ethics and included in the Manager Handbook and promoted through inclusion on the orientation checklist, at induction, and through discussion in supervision

### 3.4. REVIEW ULYSSES AGREEMENT/WELLNESS PLAN TEMPLATES AND DISTRIBUTE TO CONSUMER WORKERS AND MANAGERS FOR USE WHERE CONSIDERED USEFUL

The group did some research into the practices of other agencies and found that offering a Ulysses Agreement was seen as positive and had the potential to offer peer support workers a greater degree of control in the workplace, particularly if they have strong views on how they would like any ill health to be managed. Managers saw it as a useful tool for discussions related to managing health at work and commented that as with all staff of any classification, it is important that if the person is unwell they do not attend work but seek supportive/treatment/take time out that they need

In its discussion the sub-group thought that the name Ulysses Agreement was not the most appropriate description for the plan. Generally a Ulysses Agreement is a broad reaching proactive plan that allows the person to make decisions in advance of becoming unwell that cover a much broader range of areas than would be covered by a workplace based agreement – for example care of children, which hospital is preferred in the case of admission, housing arrangements, and so on.

*Manage your Health at Work Plan* was proposed as a possible alternative title as it clarifies the purpose and limits of the plan.

Working group members agreed that all staff should have the opportunity to complete a *Manage Your Health at Work Plan* regardless of whether they have a mental illness or a physical illness such as asthma or diabetes. This helps to reduce any stigma associated with the plan and would be triggered by the 'pre-existing injury/illness' form people complete when they are first employed at Neami. The Plans would be kept locally by the line manager and on the personnel file.

It was strongly agreed by all members that making a Plan should be a voluntary process. In situations where staff have identified that they have a pre-existing injury or illness but do not wish to complete a *Manage Your Health at Work Plan*, we agreed that it was important for Managers to explain clearly what is likely to happen if the staff member became unwell and is considered unfit for work. For example, that staff member may be sent home, and we may ask them to provide medical clearance before returning to work.

The working relationship between Manager/Supervisor and staff is critical in making use of a *Manage your Health at Work Plan*. The trust and mutual respect between staff and their Manager may contribute to the decision as to:

- Whether a plan is used; and
- Whether the plan is of benefit for the person concerned;

As it is voluntary, the Manager's role would be to support the decision and to discuss with the staff member how they would like to be supported if a period of illness or incapacity is experienced whilst at work. This may be discussed in the first supervision session and then in an ongoing way as the working relationship strengthens and the trust develops between staff member and Manager to discuss such issues in more depth.

If a plan is in place, the manager will follow the agreed actions. If not, the manager will act to the best of their ability to ensure the persons safety and that of others in the team. This point could be made explicit in the first supervision session, if a person decides not to have a plan.

Outline of the Plan (see attachment 6):

- Title – (Manage your Health at Work Plan)
- Name, date plan made, and review dates
- Statement about purpose of plan, that it is not a legally binding document, just some agreed actions to be carried out as best as possible in good faith.
- Who can see this plan (confidentiality)
- Who to contact if you become unwell (Name and contact number)
- Actions if the person becomes unwell (Is about in the event of)
- The person
- The manager/Supervisor
- Short paragraph that explains that Neami as an employer has a duty of care to ensure all staff are safe and well while at work. If the manager makes the assessment that you are unwell you will not be able to stay at work. If a plan is in place, the manager will follow the agreed actions. If not, the manager will act to the best of their ability to ensure your safety and that of others in the team. (Reinforce that each plan will be individualised for each person)

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#### RECOMMENDATION 4

The Manage Your Health at Work Plan is implemented for all Neami staff:

- All Neami staff identifying a pre-existing health condition at the point of employment or who subsequently develop a health condition are offered the option of developing a Manage Your Health at Work Plan (see attachment 6).
- Discussion of the Manage Your Health at Work Plan is included in the orientation checklist.
- Neami to ensure that the supports available to staff including the Employee Assistance Program and the Manage Your Health at Work Plan are addressed in induction.

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#### 3.5. CONSULT AND MAKE RECOMMENDATIONS TO NLT ON TRAINING, SUPERVISION AND DEVELOPMENT NEEDS OF STAFF IN RELATION TO PEER SUPPORT WORK

During 2011 the Community services and Health Industry Training Council has conducted consultations to inform the development of a Certificate IV in Mental Health Peer Work. It is anticipated that the course will become available in 2012. The consultations have also identified the need to add modules to the Advanced Diploma of Community Sector Management to reflect the distinctive management requirements associated with the peer support workforce.

Members of the working group attended and contributed to these consultations, noting the divergent opinions and practices associated with peer work. The working group also conducted a survey of Neami Peer Support workers to get a clearer understanding of the training and organisational supports they believe are required in order to perform their roles more effectively. Approximately two thirds of the Peer Support Workers responded though unfortunately there were no responses from the Way2Home team. Further discussion may be required to ensure the following recommendations reflect their views.

A summary of the key areas of training and support identified by the Peer workers themselves:

- 90% of respondents identified group facilitation skills as core training
- 80% identified Mindfulness as core training
- 70% identified Intentional peer work as core training
- 80% identified Cert 4 in Peer Work and Hearing Voices as extension training
- 70% identified Trauma Informed care as extension training

The peer workers also identified the following training for Non Peer Workers as important for supporting the PSW role:

- Supervising people with a lived experience
- Clearer understanding of the differences between the PSW and CRSW role

In addition to training the PSW also identified that access to external supervision was very important (80%) and many were already doing this. 60% were willing to participate in an internal PSW coaching/mentoring program as both a coach and coachee.

Neami's current staff training program already meets some of the identified needs with Peer Support Workers mandatory training including orientation, Flourish, Flourish & MI boosters, suicide intervention, challenging behaviours, group facilitation, safe disclosure and Carelink+. Other needs such as Hearing Voices can be accessed through extension training.

Some Peer Support Workers and managers attended training in Intentional Peer Support by Shery Mead consulting and found this interesting and useful. In discussion it was agreed that this would not be considered mandatory training as the model is somewhat different to that offered at Neami and access to training would be an issue.

In discussion about the role of Peer Support Workers it was agreed that support to self-advocacy could be an element of the role and whilst the working group was under way four peer workers completed a 3 day training on Advocacy delivered by a peer educator at the NSW Institute of Psychiatry. Others completed the Intentional Peer Support Training offered by Shery Mead and whilst not all elements of that model apply to Neami the role of peer support workers as coaches supporting self efficacy resonated strongly. They reported that this training had resolved for them the confusion they had held about the role of the PSW in a service and in a consumer's life. The group felt that training of this support could be beneficial for all peer support workers. Likewise it was felt that training about the central role advocacy plays in recovery would be useful for all service delivery positions and in particular exploration of the approach to advocacy associated with key roles.

#### Supervision

It was agreed that peer support workers could benefit from having access to an external consumer consultant for mentoring purposes on a regular basis.

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#### RECOMMENDATION 5

Develop skills of managers and SPLs in supervision of peer support workers:

- All Managers and SPLs receive training and information consistent with the management competencies identified through the Peer Workforce Competency Project. This may include key concepts of peer support, team dynamics & stigma; common issues for peer workers; professional boundaries and peer support; framing recovery stories. This training should be built into the Neami LDP.
- Build a module on supervision of peer support workers, developed by a person with appropriate expertise, into Neami's supervision training.

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#### RECOMMENDATION 6

Develop skills of Peer Support Workers and ensure there are structures in place to support their specific learning and development needs:

- Monthly facilitated meetings of Peer Support Workers at a regional level for information sharing and peer supervision using the Reflective Practice Framework.
- Introduce Supporting Self Advocacy as core training for Peer Support Workers.
- Pilot quarterly group coaching with external mentors to support professional development of peer support workers particularly in the area of resilience and professional development, and review in 12 months time.

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#### RECOMMENDATION 7

Training in advocacy for all staff (including the history of the consumer movement) is included in the Learning and Development Framework.

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### 3.6. DEVELOP COMMUNICATION STRATEGY TO INFORM AND ENGAGE OTHERS IN THE EVOLUTION OF THE PEER SUPPORT WORK ROLE

Neami is committed to expanding its consumer workforce as resources allow. The experience of the past eighteen months has highlighted the importance of communication and ongoing review to ensure the success of the initiative and that we do not run into the same difficulties experienced in other setting. Peer Support Workers have added greatly to the quality of the services provided to consumer and has been welcomed across the whole agency. Key to this is the ongoing commitment to role clarification, a responsive approach to training and strong support and supervision structures. Peer Support Workers have worked closely with Managers and other staff to refine the role and identify issues as they arise. Nevertheless Peer Support Workers have struggled in some settings with a range of issues which they have attempted to address at a local level including clarity about their role, consistency with the Neami approach and gaining legitimacy and trust within teams.

An LDP project survey of peer support workers and management revealed some confusion about the Peer Support Worker role and the need to ensure that all members of teams are aware of the role and engaged in the process of discussing implementation at a local level, within the parameters of the Neami model. Discussion amongst Peer Support Workers revealed similar issues and identified some variations in the way the role is developing, possibly reflecting personal inclinations or conditions at local sites. Whilst it is important to be responsive at a local level there is a tension which plays out across the organisation in establishing a balance with a commitment to evidence-driven and consistent practice. The working group recommendations focus on supporting ongoing, transparent discussion in the spirit of a learning organisation.

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#### RECOMMENDATION 8

Build awareness and support for the role of peer support workers across all levels of the organisation.

- Disseminate the outcomes of the consumer workforce working group and encourage discussion at State/Regional Manager meetings and State days.
- Build information about the Peer Support Work role into the Managers Handbook
- Ensure Peer Support Work is addressed at induction.

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#### RECOMMENDATION 9

Peer Support Work is integrated into planning, reporting and evaluation activities:

- Include Peer Support Work in the annual evaluation and planning template.
- Include Peer Support Work activities in the Site/Regional/State Manager reporting templates.

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#### RECOMMENDATION 10

Ongoing reflection and evolution of the peer support work role:

- Gathering of peer support workers and managers in April/May 2012 to review the role and the associated support structures including training, supervision and career progression and feed into state planning processes.

## 4. OTHER ISSUES

### 4.1. DEVELOPMENT OF THE CONSUMER WORKFORCE

In the working group there was a great deal of discussion about the nature of the peer support work role and more specifically the relationship between peer support work and other elements of the support provided to consumers. Different answers to this question have been developed in different locations and a key task of the group was to develop a clear statement about the role so that there is consistency in the way peer support workers work across all sites. Some Peer Support Workers expressed the view that they have skills and experience which are being under-utilised and were keen to see more capacity to become involved in providing individual support.

In considering this issue the working group looked at the literature on peer support and in particular the Intentional Peer Support Model and the work of the NSW CAG through its Consumer Workers' Forum Project<sup>1</sup>. It is clear from this exploration that the strength of the Peer Support Work approach lies in not taking on a casework role, but rather acting as a coach or mentor on the recovery journey. There is general agreement in the literature and in the working group that Peer Support Workers have a distinctive role and that this is complementary to the role of Community Rehabilitation Support Workers.

It was widely felt that there was a lack of clarity generally across the organisation and this had resulted in varied interpretations of the role depending on the setting. There was general agreement within the working group that peer support workers are not key workers and therefore do not have a case load or perform tasks which are the responsibility of CRSWs.

There was agreement that within Neami there are three key aspects of the role:

- Facilitation of the Flourish and associated coaching
- Supporting meaningful consumer centred engagement with the service – achieved through participation of Peer Support Workers in outreach and intake processes
- Support consumers to increase their self-agency and in turn exercise a greater degree of self-determination through coaching and self advocacy support

The exact balance between the elements of the role may vary and this should be discussed and agreed at a team level, with the focus on the best outcome for consumers and consideration of the value of lived experience in supporting those outcomes. Peer Support Workers noted that they draw on their lived experience of recovery, more so than their experience of mental illness, so that consumers are engaged in a dialogue of hope and opportunity which affirms recovery as achievable for all. It is recognised that Peer Support Workers in Way2Home and the Aboriginal Assertive Outreach Service have a primary focus on the engagement aspect of the role, whilst at the other sites Flourish is a primary focus.

<sup>1</sup> NSW Consumer Advisory Group (2010) *Consumer Workers' Forum Project*<sup>1</sup>  
*Literature Review on the Mental Health*, The NSW Consumer Advisory Group – Mental Health Inc.  
 (NSW CAG)

Involvement in other group programs or activities such as service promotion might occur where there is time or a clear advantage in involving the peer support worker. Peer Support Workers are integral members of the team and share the insights gained through their lived experience with other team members. The peer support worker is not 'an extra pair of hands' to fill in when there are staff shortages in other roles and their involvement in other activities should be a considered decision.

The PSW may be referred to as a Key Contact at a service when a consumer is only engaged with Neami through the Flourish program and as such their primary contact is the PSW facilitating Flourish. PSWs are not Key Workers and do not have a case load.

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#### RECOMMENDATION 11

A consistent description of the role of Peer Support Workers emphasising lived experience of recovery is used in Position Descriptions, on the web site and other documentation

##### *PEER SUPPORT WORKER ROLE DESCRIPTION*

*"Peer Support Workers are integral members of the team at many Neami sites. Drawing on their lived experience of mental health issues and recovery, Peer Support Workers assist others to gain their own sense of confidence and hope about their journey of recovery. At some sites Peer Support Workers facilitate Flourish, a peer facilitated recovery-based self-development program. The program focuses on individual strengths and values in aspiring towards personal goals and self-directed change. At other Neami sites Assertive Outreach Peer Support Workers collaborate with outreach teams to assist people who are homeless to identify and work towards seeking suitable accommodation and address other needs. Whilst the Peer Support Worker role varies slightly from site to site, Peer Support Workers are an important element of the team approach and bring the wisdom of experience to many aspects of service delivery including intake interviews, service promotion, group programs and case reviews. As with other Neami staff, Peer Support Workers have access to a tailored training program and to regular supervision."*

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#### RECOMMENDATION 12

All Neami position descriptions include an access and inclusion statement that emphasises the value Neami places on diversity in its workforce and encourages people with a lived experience of mental illness and recovery, as well as people from diverse cultural backgrounds, to apply for any position at Neami that aligns with their skills.

## 4.2. RECRUITMENT

When Neami first discussed pay rates for PSWs it decided to offer a broad pay range in order to reflect the wide range of skills and experience of potential candidates. Peer Support Workers can be employed across Levels 1 and 2 of the Neami National Employment Agreement. Community Rehabilitation Support Workers are employed at Level 2 of the Agreement. Neami wanted to make the positions attractive to people with substantial work experience as well as those with limited work experience. A guideline was developed in consultation with Managers to assist them in identifying the suitable rate of pay for appointees.

There was considerable discussion about the pay rates of Peer Support Workers and during the life of the working group a position in NSW was advertised at the wrong rate which added to some misconceptions about the pay rates. There was perception expressed by some peer support workers that their skills and experience or that the peer support work roles were not valued as highly as others in the organisation

The guidelines for establishing the level of pay for any appointment is based on an assessment of both qualifications and the person's experience in relevant areas, which may include group facilitation and consumer consultancy/peer support work.

A review of the classifications of existing Peer Support Workers identified there may be some discrepancies and also that some Managers were unaware of the guidelines. It also became apparent that both Managers and Peer Support Workers were unclear about progression across the pay scale. It was clarified that like any other worker PSWs can advance across the Bands, and in the case of Peer Support Workers, the Level, on which they are employed through annual increments. This means that as time goes on the proportion of people employed on Level 2 will increase.

There was a view expressed by some members of the group that the lived experience of Peer Support Workers was not being adequately reflected into the pay rate calculations. In their view Neami is open to being seen as not valuing the role unless all Peer Support Workers are on at least the same rate of pay as Community Rehabilitation Support Workers. Other members felt that the advantages of offering a broad range allowed for a diverse range of people to be employed into the positions.

### RECOMMENDATION 13

- Managers refer to the Peer Support Worker Salary Criteria and consult with HR when determining an appropriate level/band for appointments, to ensure there is a consistent approach across the organisation.

### RECOMMENDATION 14

- The classification of Peer Support Workers is reviewed in the next Neami National Employment Agreement discussions.

### 4.3. HOURS OF WORK

There was discussion in the group about whether the hours of the Peer Support Work role could be increased. Whilst there is some variability currently, most positions are .5EFT. In some sites a .4/.6 EFT model is in place. Drivers for change included the potential for Centrelink to pressure people employed for 15 hours a week or more to be capable of full-time employment. Some Peer Support Workers also felt that the role could be developed further if it was possible to increase the hours, however most current Peer Support Workers were satisfied with their hours of work.

No recommendations were developed in this area though this could be revisited in the future recognising that the capacity to offer increased hours is limited by funding targets and service agreements.

### 4.4. EVOLUTION OF THE ROLE

The issues of evolution of the role and carer progression were touched on in discussions though fell a little outside the terms of reference of the group.

- *“Flourish is a great program, I’m sure all facilitators have seen the power it has in giving people the tools to move forward in their lives. However, I am concerned that we may eventually get tired of running the same group 3, 4 or 5 times a year.”*  
*“Personally, I feel that while I am still developing my skills in relation to group facilitation, I am beginning to tire of delivering the same content over and over. I don’t know if this is a common experience, but I suspect that it might be in the future”*
- *“There appears to be no other pathway except to become a CRSW first, and then climb the ladder. I’ve had people say things like “you should apply for a promotion: become a CRSW” and other such things that imply that CRSW work is not only more valued, but also a wiser choice in relation to career goals. I would love to know ...I could one day work toward having some form of management position that involved PSW work. I don’t want to be a CRSW as it doesn’t involve that lived experience, which I find is extremely valuable. I also feel that if there were senior PSWs, it would reflect Neami’s commitment to real consumer participation at all levels, would add a consumer voice in higher management levels, keep PSW role development on the agenda, increase communication between PSWs and management (something that is currently a bit of an issue) and perhaps even provide PSWs with an internal avenue for practice relevant supervision and reflective practice.”*

There was some discussion at the Working Group about development of a Peer Work coordination role however at this stage there was not a clear view about the nature of the role. This issue is referred to the annual review (see Recommendation 10)

#### 4.5. EVALUATION

As noted at the commencement of this report the working group membership did not include consumer members due to the tight timelines for the project. This was regrettable and though there is anecdotally strong support for the role of Peer Support Workers from consumers there has been little investigation or exploration of this (with the exception of the Flourish evaluation).

#### RECOMMENDATION 15

- The findings of the Working Group are widely disseminated to consumers for their feedback.

#### RECOMMENDATION 16

- The Service Development team develop an evaluation project to explore consumer experience and perception of the value of the role of Peer Support Work to consumer recovery.

## 5. CONCLUSION

Neami has taken a considered approach to the introduction of Peer Support Workers drawing on the knowledge and evidence in the field. At this stage there are two main approaches to peer support work in the agency and, as other sites introduce the positions other approaches may emerge. Neami has committed to introducing access to Flourish at all sites which will see increased employment of peer support workers over the next few years. This is complemented by the commitment to welcome applications from people with lived experience of recovery to all roles within the organisation.

The Working Group recommendations will ensure the structures are in place to ensure individuals and managers are well-supported, and contribute to a clear and consistent approach more broadly in the organisation.



## ATTACHMENTS

1. Consumer Workforce Working Group Terms of Reference
2. Peer Support Worker Role Description
3. Peer Support Worker Position Description Elements
4. Self Disclosure Guidelines
5. Neami Code of Ethics
6. Manage Your Health At Work Plan
7. Peer Support Worker Supervision Template





## TERMS OF REFERENCE

### 1. TITLE

Neami Consumer Workforce Working Group

### 2. PURPOSE

The purpose of the working group is to review the Peer Support Worker position description and support (supervision, management, etc.) arrangements at Neami.

### 3. MEMBERSHIP

3.1 The Committee is composed of the following core members:

- Service Development Manager (Merrilee Cox)
- 4 Peer Support Workers (Hannah Wykes, Charlotte Walker, Marco De Ieso, Justin Johnson)
- State Manager (Sylvia Grant)
- Regional Manager (Craig Stanley-Jones)
- Service Manager Cyone Whiting)
- SPL (Maja Stevanovic)
- 2 CRSW (Melissa Burgemeister; Ian Draper)
- Research, Policy & Project Worker (Adam Zimmermann)
- HR Officer (Sasha Eden)
- Learning & Development Manager (Emma McTaggart)
- 2 Neami Consumers (the group decided not to pursue this)

(Selection was based on a mix of states and positions throughout the organisation – SA, Vic, NSW, QLD; representation from sites offering Flourish and Assertive Outreach)

### 5. CHAIRPERSON

5.1 The Service Development Manager chaired the group

### 6. FREQUENCY OF MEETINGS

The Working Group met 6 times

Meetings used a combination of face to face and phone conferencing arrangements

## **7. FUNCTIONS**

The functions of the Neami Consumer Workforce Working Group:

- a) Review the Consumer Worker position descriptions within Neami to ensure they reflect the evolution, distinctiveness and range of the roles
- b) Review Neami codes of ethics and conduct to ensure they are inclusive of Consumer Worker positions
- c) Personal disclosure guidelines for all staff (including Consumer Workers)
- d) Review Ulysses Agreement/Wellness Plan templates and distribute to Consumer Workers and managers for use where considered useful
- e) Consult and make recommendations to NLT on training, supervision and development needs of staff in relation to Peer Support Work
- f) Develop communication strategy to inform and engage others in the evolution of the Peer Support Work role

## **PEER SUPPORT WORKER ROLE DESCRIPTION**

Peer Support Workers are integral members of the team at many Neami sites. Drawing on their lived experience of mental health issues and recovery, Peer Support Workers assist others to gain their own sense of confidence and hope about their journey of recovery. At some sites Peer Support Workers facilitate Flourish, a peer facilitated recovery-based self-development program. The program focuses on individual strengths and values in aspiring towards personal goals and self-directed change. At other Neami sites Assertive Outreach Peer Support Workers collaborate with outreach teams to assist people who are homeless to identify and work towards seeking suitable accommodation and address other needs. Whilst the Peer Support Worker role varies slightly from site to site, Peer Support Workers are an important element of the team approach and bring the wisdom of experience to many aspects of service delivery including intake interviews, service promotion, group programs and case reviews. As with other Neami staff, Peer Support Workers have access to a tailored training program and to regular supervision.

## Attachment 2



## **PEER SUPPORT WORKER POSITION DESCRIPTION ELEMENTS**

### **ORGANISATIONAL CONTEXT**

Neami is a National not for profit mental health organisation that has been providing psychosocial rehabilitation and support to people with a mental illness for over 20 years. A range of federally and state funded programs are offered at 26 service sites in Australia.

As a progressive organisation Neami uses the Collaborative Recovery Model (CRM) to further its commitment to consumer participation and recovery through a strengths-based approach to service delivery. Neami offers a reflective team environment and attractive benefits to all staff. Neami delivers a range of rehabilitation and support services tailored to meet the individual needs of consumers. Working within a recovery based framework, this support is aimed at assisting consumers to develop independent living skills, a sense of social inclusion, and ownership of their recovery. Neami's work with consumers occurs within the context of their community of friends, family and neighbourhood. In services which receive funding through the Personal Helpers & Mentors Program, Neami is piloting Flourish, a peer facilitated group based program.

### **POSITION OVERVIEW**

Peer Support Workers are integral members of the team at many Neami sites. Drawing on their lived experience of a mental health issue and recovery, Peer Support Workers instil confidence and hope in others about the journey of recovery. At some sites Peer Support Workers facilitate Flourish, a peer facilitated recovery-based self-development program. The program focuses on individual strengths and values in aspiring towards personal goals and self-directed change. At other Neami sites Assertive Outreach Peer Support Workers collaborate with outreach teams to assist people who are homeless to identify and work towards seeking suitable accommodation and address other needs. Whilst the Peer Support Worker role varies slightly from site to site, Peer Support Workers are an important element of the team approach and bring the wisdom of experience to many aspects of service delivery including intake interviews, service promotion, group programs and case reviews. As with other Neami staff, Peer Support Workers have access to a tailored training program and to regular supervision.

#### **Group Facilitator** (FLOURISH)

The Peer Support Worker will work collaboratively in planning and co-facilitating a peer facilitated group based self development program known as Flourish. The Peer Support Worker may also assist new consumers in their entry into the service and in providing individual support to consumers focusing on their strengths to achieve their identified goals.

#### **Assertive Outreach**

The Peer Support Worker will work collaboratively as part of the Outreach Team in working through various 'hot spots' throughout the day and in developing relationships that will enable them to assist individuals to identify and work towards seeking suitable accommodation and addressing any other needs.

## SECTION B: KEY RESPONSIBILITIES

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### **Bringing your lived experience, knowledge, skills and abilities to:**

- Engage consumers and develop trusting and professional relationships that respect worker / consumer boundaries.
- Seek to learn about the consumers' interests, their connections with family and friends and work with the consumer in building their capacity to be part of their community.
- Provide emotional support to consumers by constructively applying lessons learnt through your lived experience, i.e. be a bearer of hope in that recovery can and does happen.
- Draw upon your understanding and belief in strength based, recovery oriented models of service.
- Provide opportunities to discuss problem solving strategies, reflecting on helpful and unhelpful behaviours.
- Provide social validation support by giving consumers feedback about their social interaction.
- Assist other staff members in the development and regular review of the consumer's individual service plan.
- Work collaboratively as part of a team in assisting consumers to engage with the practices associated with the Collaborative Recovery Model, i.e. assisting the consumers in values and strengths identification and clarification, assisting the consumer to complete tasks as part of goal striving (**Group Facilitator PSW**).
- Utilise the facilitation of the Flourish program to promote with consumer participants: recovery, self agency and life visioning in their communities of choice (**Group Facilitator PSW**).
- Provide emotional support to consumers by constructively applying lessons learnt through your lived experience, i.e. drawing on your experience of homelessness (**Assertive Outreach PSW**).
- Work collaboratively as part of a team in providing assertive outreach support to people who are homeless, at risk of homelessness and have a mental illness, complex needs and drug/alcohol issues , i.e. identifying the needs of consumers and developing a plan with them to meet those needs (**Assertive Outreach PSW**).

### **Participate fully as a team member**

- Co-operate closely with team members in order to ensure continuity of care and provision of a comprehensive service to consumers.
- Actively participate in reflective practice through team meetings, decision-making processes, service planning session, supervision and staff development activities.
- Contribute to the further development of best practice by informing policies and project submissions effectively drawing upon your personal experience of mental illness.
- In consultation with consumers contribute to regular evaluations of the effectiveness of the service.

### **Maintain records and resources**

- Collect, collate and maintain data on consumer contact.
- With team members collect information on community resources
- Complete monthly report as per Peer Support Worker Proforma to the Manager.

### **SECTION C: Key Selection Criteria**

- Have a lived experience of mental illness and demonstrated experience of recovery.
- Experience of the public or private mental health system.
- Lived experience of homelessness (**Assertive Outreach PSW**)
- Experience of the homeless service system (**Assertive Outreach PSW**)
- Demonstrated experience in facilitating groups, including the ability to prioritise different needs within a group (**Group Facilitator PSW**)
- Ability and commitment to work with consumers and recognise when it is appropriate to share experiences of your recovery journey.
- Demonstrated interpersonal skills and an ability to communicate with a diverse range of people including consumers, carers, family members, other service providers.
- Demonstrated ability to manage challenging behaviours/difficult situations where necessary
- An understanding of and commitment to consumer rights and responsibilities including sensitivity to the issues relevant to people with a mental illness and complex needs.
- Demonstrated ethical work practices including an understanding of appropriate personal boundaries
- Ability and commitment to work collaboratively in a team approach to service delivery.
- Computer literacy.
- Experience or training in consumer advocacy (Desirable).
- Drivers Licence (Desirable).





## GUIDELINES FOR THE USE OF SELF DISCLOSURE

### OVERVIEW

Self-disclosure can be a powerful tool in building a therapeutic alliance. These guidelines provide a basis for considering the use of personal information in working with consumers and within staff teams. They apply across service delivery, training and supervision settings.

### THE ROLE OF SELF DISCLOSURE IN PRACTICE

- The use of self disclosure in practice must be considered through the lens of the Neami Code of Ethics.
- It is the responsibility of all staff to support each other not to transgress professional boundaries.
- The use of conscious judgement is essential when disclosing personal information to consumers.
- Protection of self and others should be considered when disclosing personal information.
- An open and honest conversation with the Line Manager about personal values, attitudes, prejudices and beliefs and about the use of self disclosure should be discussed in supervision.
- It is the responsibility of all staff to limit curiosity when a colleague is sharing their experience of recovery and to ensure that the person is not encouraged to disclose beyond their comfort level.

### REFLECTIVE QUESTIONS

The following questions may be useful when reflecting on self disclosure either individually or in supervision. The primary question is: Am I doing this for the consumer or myself? Use the questions below to decide if self disclosure is warranted.

SELF	CONSUMER/COLLEAGUE
<ul style="list-style-type: none"> <li>• Do I need some supervision or some other form of support?</li> <li>• Am I in a not so good place at the moment?</li> <li>• Do I have unresolved issues that I may need to attend to?</li> <li>• Are my values/beliefs getting in the way of my work?</li> <li>• Am I disclosing to influence the direction the consumer is taking in their recovery journey?</li> <li>• Would I be comfortable if my personal details were to become public?</li> </ul>	<ul style="list-style-type: none"> <li>• What impact will my disclosure have on the consumer/colleague – short and long term?</li> <li>• How does this relate to their values/goals?</li> <li>• What skills/ capacity will this help to build?</li> <li>• What consideration has been given to risk of self or others in relation to disclosure to the consumer?</li> </ul>

#### Attachment 4

<ul style="list-style-type: none"><li>• Am I keeping true to my limits and not over-disclosing?</li><li>• Does this disclosure shed light on the recovery process?</li><li>• What practical things can I do to create a safe environment for myself and others.</li></ul>	
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## NEAMI CODE OF ETHICS

Neami acknowledges and values the importance of staff, Directors and students in attempting to fulfil the stated aims and objectives of the Organisation. As such all staff and Directors are asked to comply with the following Code of Ethics in order to ensure that expectation of each person's role is clear and agreed, thereby minimising the risk of conflict between staff and the organisation.

### 1. Commitment to Social Justice

Neami has a commitment to the following four principles:

**Equity:** a fairer distribution of economic resources and power.

**Access:** ensuring fair and equal access for people with psychiatric disabilities to those services that are important for their quality of life.

**Participation:** maximising the opportunities for people with a psychiatric disability to participate in the circumstances which affect their lives and their personal development.

**Rights:** To advocate for and promote the rights of people with a psychiatric disability regarding their civil, social, economic and political rights.

All staff and Board of Directors members will work towards achieving the above principles for those with a psychiatric disability in our community. All programs and services will reflect Neami's aim and objectives.

In addition, Neami has a commitment to providing its services to all members of the community who need them particularly people experiencing other disadvantage through low income, ethnic background, gender etc.

### 2. Confidentiality and Privacy

Members of the Board of Directors will respect the confidentiality of information obtained in the course of any meetings and not share information with reference to staff members or Directors outside the service.

Staff and Board of Directors members will respect the confidentiality of information obtained in the course of service delivery. The staff / Board member will not share confidences revealed by consumers without their consent except when compelling moral, ethical or safety reasons exist.

Staff need to inform consumers fully about the limits of confidentiality in any given situation, the purposes for which information is obtained and how it may be used.

The staff member working with the consumer will allow them access to their file.

In the event that the staff member is no longer employed at the service, consumer access to their individual consumer file will be made possible upon application to the relevant Manager and/or Chief Executive Officer. When providing consumers with access to records,

## Attachment 5

staff will take due care to protect the confidences of others contained in those records. This is particularly so, where a duty of care situation occurs and under such circumstances the line management is to be informed.

Board members and staff attending any meeting shall respect and uphold any confidences disclosed during that meeting as agreed by participating members of the said meeting.\

### 3. Professional Conduct

Staff will act to ensure that all persons with a psychiatric disability have access to the resources, services and opportunities that contribute to their wellbeing.

Staff will encourage informed participation by consumers in addressing relevant social and personal issues.

Staff will share information about their personal lives or their experience of recovery only where it is reasonably believed that it will benefit the intended audience (see attached self-disclosure guidelines).

### 4. Relationship with Employing Organisation

As an employee, the staff member will recognise that the stated aims of the organisation contribute to these and work towards the best possible standards of service to the community. Personal values contrary to those stated in the organisations' aims must not be practiced and/or exercised during all aspects of service delivery.

### 5. Consumer Self Empowerment

Staff will provide consumers with accurate information regarding the extent and nature of the services available to them and will not knowingly withhold such information.

Staff will endeavour, wherever possible, to let consumers know of their rights and the implications of services available to them.

Staff will support consumer self-determination and the right to advocate on their own behalf

## 6. Expected Behaviour of Staff

Neami staff have an obligation to work with care and skill and to act in a way which promotes Neami's and consumer interests. They agree to the following statements of intent:

- treat colleagues and consumers with respect
- be committed to team building principles

observe all Neami goals specified by the Board of Directors including those in the relevant and available constitution and strategic plan

- be aware of and sensitive to people with particular needs, including those arising from disability, birthplace, language, culture, location, financial situation, sexual preference and education
- be able to sensitively communicate with consumers, particularly those under stress, to ensure effective ongoing relationships between Neami and consumers
- communicate effectively with consumers and other agencies
- strive to meet the standards and policies of Neami
- follow lawful directions given by supervisors
- adhere to all the accounting and other procedures of Neami.
- represent Neami in a positive way
- not act illegally, unreasonably, unjustly or oppressively or in a discriminatory way
- deal with situations in a like manner, treating each on its merits
- act only after considering all relevant information. (Delete and ignoring the irrelevant)
- treat people fairly and with respect, courtesy, compassion and sensitivity
- work and use Neami resources effectively, economically and in an environmentally appropriate manner.
- avoid or appropriately resolve any conflict of interest between private interests and Neami responsibilities
- report immediately any suspected fraudulent, corrupt, criminal or unethical conduct.

In addition to the above, it is expected that staff members will not be at work under the influence of drugs or alcohol to the extent where it impairs their work performance or is detectable

## 7. Staff Financial and Legal Conduct

Additional particular responsibilities of staff in relation to the financial and legal affairs of consumers and carers (above those specified above) include that staff must not:

- attempt to influence the disposition of a consumer's will or that of a relative of a consumer in a workers favour
- witness a consumer's will or the will of a consumer's relative
- accept any financial or legal responsibility for a consumer such as: operating a bank account; accepting power of attorney; being appointed an executive of a consumer's or relative of a consumer's estate; signing credit or bank account cards
- offer specific investment advice to consumers
- offer to buy or acquire anything a consumer owns unless the transaction is approved, in advance, by the line manager (e.g. purchase of artwork).
- expect or ask for gifts or any personal material gain from a consumer and / or a carer in return for and / or appreciation of assistance provided.

## Attachment 5

- Staff must immediately inform the line manager of any unsolicited gift of a value in excess of \$10.00. The Chief Executive Officer reserves the right to direct the staff to return the gift or where appropriate to authorise the staff to keep the gift.

### 8. Agreement to the Code of Ethics

The Code of Ethics constitutes part of the Terms and Conditions of employment at Neami. Any breach of the Neami Staff Code of ethics may result in disciplinary action.

## **Manage Your Health at Work Plan Overview**

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### **Purpose:**

The purpose of this plan is to provide with you with an opportunity to plan in advance with your manager any actions you would like followed to assist you in the event that you become unwell and are not able to remain at work. The plan is not a binding agreement, but a set of actions that you and your manager will seek to follow in good will should the need arise. The plan is voluntary, and can be reviewed with your line manager at any time.

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### **Scope of the plan**

The principle of the plan is to give you the opportunity to specify actions you would like to have followed in the event that you become unwell and are unable to stay at work. The plan will not encompass your specific wishes beyond those that directly affect your work – for example child/family arrangements, medical treatment and care, etc will not be covered by the plan. Information such as contact numbers for your medical practitioner, a close friend, family members, carers or other people may be included, as well as your specific wishes relating to work. The plan may include early signs that suggest you are becoming unwell, or may be used simply to capture contact numbers of people you would like notified in the event you cannot remain at work.

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### **Who will see this plan?**

A copy of the plan will be kept by your line manager, by you, and on your personnel file at Head Office. In the event that you become unwell and your manager is away or unavailable, the acting line manager or another member of the team may contact Head Office to ascertain if you have completed a Manage Your Health at Work Plan that contains specific actions you would like followed.

If there are certain details about your health that you wish to keep strictly confidential, you can discuss these with your line manager, and you may consider not including them on the plan. The plan should not be seen as an alternative to the development of a structured and supportive professional relationship with your line manager.



Attachment 6

We agree to the above plan of action. In the event that I become unwell whilst at work, I realise that this plan may not be used if circumstances necessitate a response to ensure my safety or the safety of others.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_





Attachment 7

**Staff development & actions**

<b>Goals</b>	<b>Action</b>	<b>Person responsible</b>	<b>Time Frame</b>	<b>Date of Review</b>

**Professional Development goals/ training needs/ requests:**

**Self care/comments/feedback:**

**Date & Time of next Supervision (fortnightly pro rata):** \_\_\_\_\_

**Signature and Date (Staff):**

**Signature and Date (Line Manager):**

