

Employer's guide to implementing a peer workforce

- 1 A case
for your
organisation
- 2 Planning
Toolkit
- 3 Language
Guides



Peer Work Hub
growing the lived experience workforce

Vision Statement

People with lived experience have unique expertise that can be transformative for people who access services, their families, carers and for mental health services and systems.

To achieve a recovery-oriented system of mental health and social support, we need peer workers everywhere in that system. We need peer workers to provide peer support to consumers and carers. We need peer workers to participate in quality improvement, evaluation, and design of services. We need peer workers in policy and planning roles. We need peer workers in management positions and working as system leaders.

ISBN: 978-0-9945046-5-4

© 2016 State of New South Wales.

Acknowledgements

The content of this resource was informed by research conducted by Leanne Craze of Craze Lateral Solutions and in consultation with peer workers. All photographs are reproduced with permission.

Disclaimer

The materials presented in this publication are distributed by the Mental Health Commission of NSW as an information source only. The information and data in this site is subject to change without notice.

The State of New South Wales makes no statements, representations, or warranties about the accuracy or completeness of, and you should not rely on, any information contained in this publication.

The Mental Health Commission of NSW and the State of New South Wales disclaim all responsibility and all liability (including without limitation, liability in negligence) for all expenses, losses, damages and costs you might incur as a result of the information in this publication being inaccurate or incomplete in any way, and for any reason.

Contents

Welcome	2
Symbols used in the toolkit	2
Language used in this toolkit	3
How to use this toolkit	3
Introduction	4
Planning for a peer workforce	4
Step 1. Assess your readiness	5
Define your purpose	5
Scope your plan	5
Readiness for change	6
Cultural readiness	6
Critical success factors	7
Step 2. Review and plan	9
Engaging stakeholders	9
Profiling teams and workforce	10
Defining peer worker roles	11
Step 3. Manage change	12
Communication and change management	12
Educate your existing workforce	12
Conflict and concerns	13
Step 4. Recruit and develop	15
Recruitment	15
Development	17
Step 5. Manage performance	20
Supervision and line management	20
Performance Review	21
Resignations	22
Career Planning	22
Exit interviews	22
Step 6. Evaluate and revise	23
Monitoring	23
Evaluation	23

Welcome

Welcome to the Peer Workforce Planning Toolkit – an employer’s guide to implementing and developing a peer workforce.

This toolkit has been produced as a guide to assist in the development and implementation of a Peer Workforce Plan. The toolkit includes clear explanations of what needs to be considered in the planning process and a series of customisable Worksheets, Checklists, Info Sheets and Quick Tips to accompany each step.

If you’re not a current employer of peer workers you may like to start at the beginning of the toolkit and work your way through. If you’ve been working with peer workers for a while, you may not need everything in the toolkit, but you will be sure to find a number of useful resources.

SYMBOLS USED IN THE TOOLKIT



Worksheets

This symbol indicates that a Worksheet is available for you to use in your planning process.



Checklist

This symbol indicates that a Checklist is available for you to use in your planning process.



Info sheets

This symbol indicates that an info sheet is available to provide extra information to assist in your planning process



Update

This symbol indicates each time you need to Update your Plan



Language used in this document

In the mental health sector language is vitally important and is subject to a range of preferred words and definitions. If you are unfamiliar with the current language used by the mental health sector, or you want to clarify the definitions used in this toolkit, please consult the accompanying *Language Guide in our Employer's Guide to Implementing a Peer Work* suite of resources. Separate Language Guides have been developed for consumer peer workers and for carer peer workers.

While leadership for growing a peer workforce can be demonstrated by people at all levels of the organisation, ultimately senior management will sign off on the intention to employ peer workers. If senior leaders aren't yet on board you may like to use the business case

Peer Workforce - a case for your organisation in the Employer's Guide to Implementing a Peer Work suite of resources, in your internal advocacy for employing peer workers.

How to use this toolkit

The Peer Workforce Planning Toolkit will guide you through a six step planning process. These steps are:

- 1 Assess your readiness
—
- 2 Review and plan
—
- 3 Manage change
—
- 4 Recruit and develop
—
- 5 Manage performance
—
- 6 Evaluate and revise

As you move through the toolkit you can fill in your Peer Workforce Plan Worksheet (Attachment 01). At each step as you update your Plan with information, actions, and progress, your Peer Workforce Plan will begin to take shape. The Worksheets, Checklists, Info Sheets and Quick Tips are tools to help you source and capture relevant information for your Plan and keep you on track.

Once you have worked through the toolkit your Peer Workforce Plan will be complete!

Introduction

Planning for a peer workforce

The peer workforce is increasingly seen as a way to help transform mental health systems in Australia. This development is part of a worldwide movement that hopes to embed recovery-oriented practice, and transition mental health services and systems towards a more recovery focused mode of operating.

In taking the time to engage in a peer workforce planning process you will be able to integrate peer workers in a strategic way within your organisation.

This toolkit will guide you as you grow and develop your mental health peer workforce. The step-by-step approach outlined here will help ensure your peer workforce is appropriately integrated and positioned for success; and enable your future peer workforce to contribute positively to your organisation's current and future needs and goals.

Start with Attachment 01 the Peer Workforce Plan Worksheet. The content for the Worksheet will be developed and refined as you work through the toolkit.

At each section when you are asked to Update your Plan input information into your Peer Workforce Plan worksheet below.

Once you have worked through the toolkit your Peer Workforce Plan will be complete!



ATTACHMENT 1 - Peer Workforce Plan



Step 1.

Assess your readiness

Define your purpose

The commitment to develop and implement a Peer Workforce Plan should start with the senior leaders in your organisation. They need to think about why a peer workforce is needed and wanted. A clear articulation of the goals and objectives is critical to success. Some initial questions to get started could be:

- What is the overall aim of the peer workforce planning project?
- What has inspired you to create peer worker roles?
- What do you hope to achieve by creating peer workforce?
- What are the unique contributions of peer workers to your strategic vision?
- Will your peer workforce include both consumer peer workers and carer peer workers?
- How will peer workers complement existing roles?
- How will a peer workforce align with your overall strategic mission?



ATTACHMENT 2 – Define Your Purpose Worksheet

 **Capture your answers from the Worksheet and Update your Plan!**


Scope your plan

The initial scope of your Peer Workforce Plan should focus on the major objectives, stakeholders and what is in and out of scope. Some initial questions to get started could be:

- What the peer workforce plan must deliver
- What is not included in your peer workforce plan
- Assumptions and constraints– for example, resources and budget; timelines; existing data and knowledge; existing systems and processes; strategic and operational plans. Focus on how such factors may impact on your plan
- Risks – for example, project manager under-resourced or under-skilled for the task; senior leadership loses interest
- Dependencies – actions that cannot be done until other things are put in place.



ATTACHMENT 3 – Scoping Planner Worksheet

 **From the worksheet establish your project scope statement and update your plan!**

Readiness for change

Next, think about how your organisation works in the current climate so you can assess its readiness for change:

- Is your organisation ready to undergo change?
- Are you able to integrate a peer workforce?
- What external and internal influences may impact on the employment of peer workers?

Design and organise a workshop to assess these questions.

The Readiness Checklist can be used to focus and direct the discussions.

Try to identify what should be in place before you start developing your peer workforce. Answering 'no' to any of the questions in the Checklist does not necessarily mean you are not ready to start, but it may highlight areas that will require additional time and focus.

Quick Tip

You can explore these questions and more via a stakeholder workshop.



ATTACHMENT 4 – Readiness checklist

Cultural readiness

Peer work is most effective in settings that have a pre-existing commitment to the values and principles of recovery. Peer workers may greatly enhance this commitment, but it is unrealistic and unsafe to expect them to introduce these values and principles to an organisation not already committed to them.¹

So, 'get the barometer out' and benchmark your vision, strategic planning, policies and procedures, practices and culture, in relation to:

- recovery orientation – are your services person-led and designed to support people to make individual choices, focusing on their strengths, their desires and their potential to change and learn?
- strengths-based practice – do your services focus on the person's strengths and capacities, and on creating a plan based on the person's goals?
- trauma-informed care – are your services designed not to re-traumatise people?
- a mentally healthy workplace – do you have HR policies and procedures to support a mentally healthy workplace?
- a family/carer aware workplace – are you aware of the caring and support roles that many employees have in their personal lives?

The Peer Work Values and Principles Info Sheet has more on these important practices.



ATTACHMENT 5 – Peer Work Values and Principles Info Sheet

🔗 Based on working through the Readiness Checklist and the Peer Work Values and Principles Info Sheet assess the actions that need to take place to become ready to implement a peer workforce. And **update your plan!**

¹ L Smith, & S Bradstreet, Experts by Experience: Guidelines to support the development of peer worker roles in the mental health sector, 2014, Scottish Recovery Network, Glasgow, Scotland.



Critical success factors

Determine the factors that are critical to the success of your Peer Workforce Plan. Are there any internal or external variables that may impact on your plan? The critical success factors of your Peer Workforce Plan may include the purpose, objectives or goals of the project. Defining these factors enables you to create a common point of reference to help direct and measure your success. A great way to tackle these questions is through PESTLE and SWOT analyses.

A PESTLE analysis is a comprehensive way to understand a range of external influences that may impact your organisation's implementation of a peer workforce. The six PESTLE categories – political, economic, sociological, technological, legal and environmental forces – provide a broad view of the external operational environment for your organisation. Step through the *PESTLE Analysis* below.

Quick Tip

Both PESTLE and SWOT exercises can be conducted as a group brain storm activity.



ATTACHMENT 6 – PESTLE Analysis

A SWOT exercise can show you how the external factors identified in the PESTLE can be considered in relation to your workforce. These external factors – for instance forces driving change – might present an opportunity or a threat to your organisation depending on the conditions. Specify the conditions that influence each possibility, particular as they relate to your workforce both now and in the future as you implement your Peer Workforce Plan. Step through the *SWOT Analysis Worksheet* below.



ATTACHMENT 7 – SWOT Analysis

🔗 **Capture your answers from the checklist and your quiz and [update your Peer Workforce Plan](#).**

Congratulations! You have completed the Step 1 in your Peer Workforce Planning Project.



**Trent Kilby, Aboriginal Support
Facilitator, Aftercare, Partners in
Recovery Nepean Blue Mountains**



Step 2.

Review and plan

Bring together the elements from Step 01 and decide on your development priorities and implementation strategies. Look at the information you have compiled so far:

- Project Purpose
- Project Scope Statement
- Project Outcomes
- Stakeholders
- Organisational Readiness
- Critical Success Factors

Engaging stakeholders

Now that you have scoped your Peer Workforce Plan, nominated stakeholders and established your organisation's readiness to implement a peer workforce, identify who among the stakeholder group will champion the initiative and get the necessary 'buy in' from other stakeholders. Start with a stakeholder engagement plan that considers all the stakeholders involved and how best to engage them in the process. You will find that different stakeholders require different levels of engagement in the Plan.

The people designated to champion the initiative can provide updates about ongoing work and get feedback from all stakeholders. Start a conversation across your organisation about why a peer workforce is needed and wanted. This will give you the opportunity to inform all your staff about best practices in peer work, and how these may impact and change current systems.²


Consulting stakeholders will help to fine tune approaches, accommodate individual stakeholder priorities and address negative experiences before they undermine the project, enabling your plan to proceed more smoothly. By using the Stakeholder Engagement Planning Process Info Sheet below you will be able to nominate which stakeholders require levels of engagement and what the engagement activity may look like.

Quick Tip

Consider establishing an advisory committee to assist in navigating the change that comes with developing a peer workforce.



**ATTACHMENT 8 –
Stakeholder
Engagement
Planning Process
Info Sheet**

 **Define your stakeholder engagement strategy from the info sheet and [update your plan!](#)**

² Lyn Legere, A Providers Handbook on Developing and Implementing Peer Roles, with contributions from the Western Mass Peer Network & Sera Davidow of the Western Mass Recovery Learning Community, Lyn Legere Consulting, retrieved 12 January 2016 from <http://www.psresources.info/images/stories/A_Providers_Handbook_on_Developing___Implementing_Peer_Roles.pdf>.

Profiling teams and workforce

When establishing a peer workforce it is important that it aligns with your overall workforce strategy and plans. Therefore before defining the peer workers roles that you will need, it is best to think about how they will be integrated into your existing workforce. You can do this by reviewing the characteristics of your current workforce and by identifying how peer workers will fit in and where they can contribute the most. The profile of your current workforce may include looking at the following factors:

- Job roles/classifications
- Full-time equivalent staff (FTE) and/or headcount (the actual number of employees)
- Gender mix
- Employment Status (full-time/part-time/casual)
- Age (including time to retirement)
- Cultural identity/Non-English Speaking Background
- Indigenous identity
- Existing qualifications of the workforce
- Staff turnover (overall or specific to job roles/classifications)

Specific information about individual employees typically collected during annual performance planning and reviews can also be systematically collated to inform peer workforce planning. This information may help you to identify skills gaps.

Once you understand the profile of your current workforce, think about your future needs to maintain service delivery.



ATTACHMENT 9 – Current Workforce Profile



Defining peer worker roles

The uniqueness of peer worker practice needs to be preserved when you define your peer worker roles. A good way to make sure this happens is to enlist experienced peer workers to draft your peer worker roles and position descriptions. Alternatively, you should consult with experienced peer workers through mental health consumer or family/carer representative organisations or via peer-run advisory services prior to drafting them.

Bear in mind that peer worker roles are serious jobs that need to align with peer worker practice. Remember:

- Peer workers have particular skills that you need to use. Don't sideline peer workers because you don't know what they should be doing. Recognise their skills and training, and give them relevant tasks. They are not there to do work that no one else wants to do or general tasks that anyone can do such as answering phones, filing or being a taxi driver.
- Peer workers are not there to focus on a particular agenda (except the agenda of the person they are supporting). Do not see them as a way to get information for the rest of the team. Similarly, don't define their activities by provider paperwork, such as treatment plans.
- Be careful not to ask peer workers to do something that will increase the power imbalance (or the perception of power imbalance) between them and the person they're supporting. For example, peer workers should not be asked to check and report on compliance with Community Treatment Orders, to make spending decisions about a person's own money, provide opinions about how a person is functioning, complete assessments, or be asked to try and convince someone to do something they do not wish to do.³

Now that you have worked through your current and future workforce and identified where peer worker roles will fit in and **update your plan!**

Centre front Andrea Taylor, Northern Sydney Local Health District Director, Mental Health and Drug & Alcohol, and Kate Jeffrey, Community Engagement Manager, Mental Health and Drug & Alcohol and their team of peer workers (from left) Mariko Ranawake, Paula Hanlon, Natalie Watson, Elisabeth Stewart and Conrad James



Step 3. Manage change

Communication and change management

Implementing a peer workforce will inevitably mean change for your organisation. Managing change well requires strong leadership, good strategic planning and clear, focused communication that brings stakeholders along the journey. People implement change and effective change needs a motivated and appropriately skilled workforce.

Communication is at the core of effective change management, whether leading change, motivating and managing a team, delivering a service, dealing with difficult situations, or managing personal and professional relationships.

If communication is not effective, coordination breaks down, relationships suffer, mistakes happen and productivity can come to a halt. The following Info Sheet has some useful communication tips to assist you in navigating the change that will result when you implement your peer workforce. Access the *Change management and Communication Info Sheet* to learn more.



ATTACHMENT 10 – Change Management and Communication

Educate your existing workforce

If you have not previously employed peer workers, it is important to prepare existing staff to work with them. Staff understanding of specific peer roles and their importance to the organisation is key to changing your organisation's culture. The more staff embrace the ideas behind a peer workforce the more likely they will be to support its implementation and, in turn, make the transition successful.

It can be a good idea to offer peer-led training for staff and include input from non-peer managers experienced with peer work. Ideally the training should aim to promote a 'well oiled' multidisciplinary workforce, one that welcomes, accepts and values each other's expertise, knowledge and roles. Training could include:

- definitions of peer work
- origins and development of peer work
- values of peer work
- the benefits and evidence base for peer work
- peer perspectives on boundaries
- viewing addiction, mental distress, services and interventions through a peer lens
- identifying and eliminating stigma and discrimination in the workplace
- if relevant, providing space to 'unpack' any difficulties staff may have with peer colleagues.⁴

⁴ Te Pou, Service user, consumer and peer workforce: A guide for managers and employers, Midland District Health Boards, Te Pou o Te Whakaaro Nui & Northern Regional Alliance, 2014, retrieved 12 January 2016 from <www.tepou.co.nz/uploads/files/resource-assets/service-user-consumer-and-peer-support-workforce-a-guide-for-managers-and-employers.pdf>.




Conflict and concerns

The introduction of peer worker roles into an organisation creates the potential for conflict. It is important that all views are canvassed and that conflict is brought out into open and discussed respectfully. Some ideas to keep in mind:

- set ground rules for respectful discussion
- create an environment where everyone feels comfortable discussing their views, e.g. learning circles
- anticipate and be prepared to respond to questions
- provide a series of open and closed forums that allow staff to discuss their concerns without fear or favour
- invite consumer representatives and staff to participate in problem-solving issues and concerns raised
- involve multiple stakeholders in the orientation and training of employees.⁵

Quick Tip

A good way to test the views and the overall engagement of staff at any given time is through a staff satisfaction survey. See the Staff Satisfaction Survey example here.

 **Consider all of the information in communication and change and how this may impact your stakeholder engagement activities and if there are any additional steps to be taken and [update your plan!](#)**



**ATTACHMENT 11 -
Staff Satisfaction
Survey**

⁵ Legere, p. 24.



**Lily Wu, Peer Support Worker,
South Western Sydney Local
Health District**

Louise Walsh, Peer Leader,
New Moves, Chatswood





Step 4.

Recruit and develop

The key thing to remember when employing peer workers is that good human resource management practice makes the workplace good for all employees. You may already have comprehensive systems and policies in place. If you do then you have the basic building blocks for successfully recruiting and supporting peer workers.

Recruitment

In order to fill your peer worker roles, you first need to attract a pool of candidates with the desired skills, knowledge, experience and attitudes. From this pool you will select the best person, taking into account your selection method. Remember, that while you are looking for the 'right fit' employee, potential new peer workers are looking for the 'right fit' organisation to match their needs and aspirations too. Matching your organisation with the right people is the key to successful recruitment.

Start by thinking about the values and goals in your organisation that might attract peer workers. For instance, review what you have to offer in the following areas:

- your reputation
- workplace culture
- the remuneration and conditions
- the training and development opportunities
- flexible employment arrangements
- career development

This will help enable you to design a positive advertising and promotion campaign to attract suitable candidates, and give them an idea of what they can expect.

The job description

Peer worker position descriptions should be written at the outset of the recruitment process in conjunction with peer worker leaders or representative organisations. Use language that is consistent with recovery orientation, peer work values and principles; and make sure to outline competencies appropriate to the specific peer work role. A well-written position description has a better chance of attracting skilled candidates. Position descriptions for the peer workforce should follow the same principles as those for any other workforce. They need to:

- define and articulate the responsibilities and tasks of the position and identify each of the functions covered by the role
- ensure the selection criteria covers the range of skills, knowledge, experience and training required to perform the role
- determine accurate remuneration and grading of the position, taking into account roles and responsibilities and relevant education qualifications
- allocate hours per week to fulfil all aspects of the role
- detail line management and direct reports
- outline any budgetary responsibilities.⁶

⁶ NSW Mental Health Consumer Workers Committee & BEING (formerly NSW CAG), A Framework for the NSW Public Mental Health Workforce, Sydney, 2013, p. 26, retrieved 8 April 2016 from <being.org.au/wp-content/uploads/2015/06/Framework-2013-sent-to-CAC-270913.pdf>.

Remuneration and employment conditions

Peer worker remuneration should be commensurate with skills, expertise and experience and comparable to that for non-peer workers. Peer workers should also be entitled to the same conditions and entitlements as other employees, including salary packaging.

Remuneration scales and state awards might apply depending on the nature of the role. For example consumer researchers should be paid the same as other researchers doing similar work with similar experience.

Selection criteria

The completion, commencement or willingness to undertake a Certificate IV in Mental Health Peer Work is increasingly regarded as a minimum requirement for a peer worker role. There is also a growing tendency to stipulate a bachelor's degree in a relevant field. Bear in mind, though, that often those most suited to supporting another person in recovery – by reason of their lived experience and their demonstrated expertise in sharing that lived experience – might not have a tertiary qualification. Before specifying that a tertiary degree is required, think about the value it adds to the specified roles and functions:

- is a degree necessary? Why?
- how does the value base and core competencies of the professional qualification conferred by the degree compare to peer worker values and core competencies?
- how will you ensure the authenticity and fidelity of the peer worker role if a person has qualifications in a professional qualification other than peer work?



ATTACHMENT 12 – Role Development Checklist

Advertising for success

Make it clear when you advertise for a peer worker that the role is designated for someone who has lived experience of mental illness, or of supporting someone with mental illness (depending on the position) and who:

- is in recovery
- has integrated their lived experience into their lives
- is not be ashamed of their experience (or their family member's experience)
- has an understanding of stigma, discrimination and trauma
- is able and willing to share their lived experience to inform their work and support another person with their recovery.⁷

Position descriptions and job advertisements need to be explicit about these requirements. It is also sensible to articulate the values and goals of your organisation in the ad, because this will help to attract the right candidates. Also consider suggesting that candidates may request adjustments if necessary to allow them to participate equitably in the recruitment process.



ATTACHMENT 13 – Position Descriptions

7 TO COME



Select

It's important to determine the selection method for your peer worker position, and the relative weight you want to give to each component – for example, cover letter, resume, selection criteria, interview, and referees – before you advertise. This enables you to ask job seekers to supply the information you need so you have an effective, fair and equitable assessment process. Of course you should always take into account relevant equal opportunity and anti-discrimination legislation. Approach the task of employing a peer worker as you would for any other position. In particular, be careful to avoid the following pitfalls:

- employing someone because you believe it would be good for his or her recovery to be working in the role
- employing a strong applicant, even though you think he or she probably isn't right for the job
- shifting a person who has been in a clinical role with your organisation for a long time into a peer role because it's easier to employ someone already familiar with the organisation
- showing tokenism or paternalism by lowering recruitment standards just to fill the position.⁸

Interview

Interview candidates using a planned and open process. A well thought-out interview process, should help to ensure the best candidate is identified for the new peer role.

You should include employees with experience of working as a peer worker on the selection panel. If you don't have any existing peer workers, organise an external peer worker to fulfil this role. Make sure, too, that the non-peer members of the selection panel have a good awareness of recovery and the importance of the peer role.⁹



ATTACHMENT 14 – Sample interview questions

Development

Once you have filled the position, you need to introduce the successful candidate to your organisation and make sure they have the opportunities and training they need to perform their role to the best of their ability. The development of a new peer worker starts with induction. Through the induction process you can explain to new peer workers both what they should expect and what they are required to do. This will help them to fit in and become part of the team. Training and other ways of increasing knowledge and improving skills will develop the new peer worker's potential and improve their capabilities.

Induction

Welcoming a peer worker into your organisation and making them feel comfortable in their new workplace helps to reduce any anxiety about starting a new job. When you plan your induction process, consider whether the new peer worker has had recent work experience – this position might be their first job since leaving school, or in a long while. Remember to include basic information such as the terms and conditions of employment, any legal and compliance requirements and also pay attention to the health, safety and wellbeing of the new peer worker. Consider any reasonable workplace adjustments you can make that will help their performance.

⁸ Legere, pp. 58–59.

⁹ A Framework for the NSW Public Mental Health Workforce, p. 28.

A good quality and relevant induction for peer workers lets them know where they fit in. The induction plan might include:

- organisational policies and procedures
- introductions and meetings with co-workers and peer worker networks
- the organisation's peer worker statement
- the organisation's vision for peer worker roles
- the plan for the development of the peer workforce
- peer worker roles and positions within the organisation's multidisciplinary workforce
- what it means to be part of a multidisciplinary team
- line management and supervision procedures
- opportunities for professional development
- a code of conduct and ethical considerations, for example an awareness of confidentiality and boundaries.

Induction helps to establish good work habits, creates a professional impression of the organisation and your management style. It can also establish clear expectations to assist with performance, training and development plans. New peer workers should have the opportunity to ask questions, seek assistance and even suggest improvements.

Quick tip

An experienced buddy who can support and mentor a new peer worker in the first few weeks is a key factor for successful integration. Ideally you should assign another peer worker to show your new employee 'the ropes', but if this is not possible, make sure you find someone who understands and supports the peer role.



Sandy Degrassi, Peer Educator and Community Engagement and Promotion Officer, South East Sydney Local Health District Recovery College



Reasonable adjustments

Some of your peer workers may require workplace adjustments to fulfil their role more effectively. They are not alone in this – most employees face times when they need to seek reasonable adjustments in the workplace.

Under the Australian Federal Disability Discrimination Act 1992, and the NSW Anti-Discrimination Act 1977, employees with a mental illness, such as Consumer Workers, are considered to be employees with a disability. Both acts require workplaces to make work-related reasonable accommodations to enable employees with a disability to perform their work. The Australian Human Rights Commission reminds employers that they must ‘consider reasonable adjustments in the workplace for workers with mental illness’ to comply with anti-discrimination legislation, and points out that these ‘adjustments enable a worker to carry out their job to the best of their ability, making them a productive member of your workplace’.¹⁰

To minimise difference between peer workers and the rest of your employees think about how the workplace can be flexible for workers with a variety of experiences and situations. Reasonable adjustment can be made at all points of the employment lifecycle – recruitment, induction and ongoing performance management. Learn more from the *Reasonable Adjustments Info Sheet*.



ATTACHMENT 15 – Reasonable adjustments

Privacy and confidentiality

Because many peer workers have jobs that require them to share their lived experience, managers can be lulled into accepting lower compliance with privacy requirements. Remember peer workers choose what to share and what to disclose during the performance of their roles. Managers and peer workers both need to be clear about what information can be shared with other employees – who, when and for what purposes. This requires discussions and agreement underpinned by practices, principles and rules.

Training

Training obviously goes hand in hand with career planning, and is intrinsic to developing a workforce. Training may include teaching specific skills, or developing capabilities through a range of strategies including mentoring, ‘acting up’, secondments and external study.

A new national qualification, the Certificate IV in Mental Health Peer Work, is specific to workers who have lived experience of mental illness as either a consumer or family/carer and who work in mental health services in roles that support consumer peers or family/carer peers. It is quickly becoming required training for mental health peer workers and a number of organisations are supporting their peer workers to obtain this qualification during the course of their employment. The course details and a number of resources can be found on training.gov.au website.



ATTACHMENT 16 – Certificate IV in Mental Health Peer Work

¹⁰ Australian Human Rights Commission, Creating a safe and healthy work place for all, from *Workers with Mental Illness: a practical guide for managers*, 2010, Chapter 4, retrieved 12 January 2016 from <www.humanrights.gov.au/publications/2010-workers-mental-illness-practical-guide-managers/4-creating-safe-and-healthy>.

Step 5.

Manage performance

Performance management covers day-to-day supervision, professional reviews and career development. It creates a context that can help peer workers understand how their work aligns with the overall goals of the organisation, and the part they play in achieving these goals. This knowledge often makes them more productive, enthusiastic and committed. Good performance management can also identify underperformance and its reasons (whether work related or personal) before it becomes a significant problem. It helps with workforce development and career planning and allows an opportunity to reflect on skills gaps and productive training.

Supervision and line management

Line management should be distinguished from professional supervision. The line managers of peer workers have responsibility for:

- the allocation of workloads and overseeing their completion
- day to day OH&S matters
- ensuring resources are available to undertake the role
- the provision of advice regarding immediate concerns and problems
- debriefing
- regular team meetings
- leave approvals
- compliance with policies and procedures
- probation periods
- annual professional development reviews
- the annual performance development and training plans
- issues related to the workplace and role
- the arrangement of workplace accommodations.¹¹

Ideally, peer workers should be line managed by other peer workers. Alternatively, their managers should have either a formal relationship or an informal arrangement with a peer worker leader or a peer-run provider of training and supervision. This will give them the opportunity to discuss and understand peer values, peer roles, and peer practice issues and tensions.¹²

Professional supervision, on the other hand, evaluates how well peer workers are using their peer worker skills in the work environment, and the challenges, issues, dilemmas and tensions they encounter in practice. The supervisor in this instance needs to be a more experienced peer worker who can provide the structure and a safety net to make the position viable and successful.

¹¹ A Framework for the NSW Public Mental Health Workforce, p. 34.

¹² Te Pou, A guide for managers and employers, p. 16.



Peer worker supervision provides structure to:

- reflect upon and review current working practices
- examine and explore strategies in working with particular consumers or situations, where this can be undertaken in a confidential context
- debrief on any work-related issues
- explore new practices, developments, ideas and perspectives related to the peer workers and critically evaluate them
- monitor and support the peer worker's wellbeing and coping capacity in relation to their work
- problem solve
- explore career development opportunities.¹³

Peer supervision works best when the supervisor develops a partnership relationship that promotes mutual reflection on working practices. Organisations unable to offer an experienced peer worker as a supervisor should find an outside supervisor. This might also be appropriate for a peer worker who would prefer an external supervisor. Peer worker supervisors should be offered training in providing peer worker supervision.¹⁴

Performance Review

Peer workers, like other employees, must be held accountable for doing their job well. Performance reviews, both formal and informal, encourage peer workers' ongoing success and satisfaction. A structured, regular performance appraisal or review creates an opportunity for peer workers to raise issues and concerns and to express their opinions about their work, or the organisation's culture. Performance reviews allow all parties to assess the peer worker's work.

An annual (or more regular) review and performance meeting allows the manager and/or supervisor to establish goals and activities aligned with the peer worker's role and career aspirations. A formal review that measures how each party is meeting agreed goals can also help to address any conflicting expectations.

The Australian Human Rights Commission provides the following advice for managing performance concerns for workers, including peer workers and other employees with lived experience of mental illness:

- take into account personal circumstances that may contribute to a worker's performance issue, as you would for all workers
- consider whether a mental illness may be contributing to the poor performance
- consider the seriousness of the performance concern (for more serious matters, such as violence, there may be no option but to take strong disciplinary action regardless of whether there is a reason, such as a mental illness)
- consider whether the performance concern relates to a key part of the job or if the work could be adjusted to address or avoid a recurrence of the particular concern
- encourage and enable the worker to discuss the performance concern and whether there are any health issues that may have impacted on their performance.¹⁵

Organisations should periodically reflect on the lessons of the review process. The lessons might lead to changes in the workplace plan itself, the way it is being implemented or to other policies, procedures and practices in order to deliver better services.



ATTACHMENT 17 – Performance Concerns



ATTACHMENT 18 – Performance Review

¹³ A Framework for the NSW Public Mental Health Workforce, p. 35.

¹⁴ Te Pou, A guide for managers and employers, pp. 15–16.

¹⁵ Managing Mental Illness in the Workplace, from AHRC, Workers with Mental Illness, Chapter 3, pp. 19–20, retrieved 12 January 2016 from www.humanrights.gov.au/publications/2010-workers-mental-illness-practical-guide-managers/3-managing-mental-illness#s3_4.

Resignations

Experienced peer workers recommend that managers do not automatically accept the resignation of a peer worker who is away from work due to mental illness. Instead, treat the person as you would another staff member on leave for illness. As one experienced peer worker explains 'support the person to get back to work as soon as possible, even if it is on reduced hours'. See if the person 'still wants to resign once they are back into the routine of work'.

Career Planning

As with all employees, peer workers will have career objectives beyond the job they are currently doing. They are likely to think about the jobs they want to do and the skills they need to do them. When you manage the performance of peer workers, you can encourage individual career goals and help to develop a career plan. This plan can be evaluated at regular intervals, in conjunction with performance reviews.

The benefits of working with peer workers to develop their skills and achieve their goals includes improved morale and a more motivated workforce. It will also enhance your reputation as a preferred employer which, in turn, will attract job seekers the next time you need to recruit.

Exit interviews

When a peer worker leaves your organisation, an exit interview can capture information that may not otherwise be available to you. An exit interview gives you the opportunity to find out whether your peer worker found the organisation to be 'peer worker friendly' and, if they didn't, you can ask what barriers they found and what potential solutions there might be. If you know why someone has left, you may be able to make changes in the workplace so others don't leave for the same reasons. Exit interviews may reveal a whole range of issues about working conditions, job design, inter-office relationships including management problems, misleading recruitment practices, inadequate training opportunities and general morale. You can also learn about what does work and what should be developed.

Bear in mind that the point of an exit interview is not to interrogate the peer worker who is leaving, but to gather useful information. Ask questions that allow your peer worker to give as much information as they wish. Sometimes an exit interview conducted by a third party allows for a freer discussion.

Quick Tip

When a peer worker leaves your organisation an exit interview conducted by a third party could allow for a freer discussion.

15 Managing Mental Illness in the Workplace, from AHRC, Workers with Mental Illness, Chapter 3, pp. 19–20, retrieved 12 January 2016 from www.humanrights.gov.au/publications/2010-workers-mental-illness-practical-guide-managers/3-managing-mental-illness#s3_4.



Step 6.

Evaluate and revise

Monitoring and reviewing your Peer Workforce Plan is an ongoing activity. The information that you have gathered as you have stepped through this toolkit will be able to be used as baseline information from which you can monitor and evaluate how your peer workforce is developing.

Monitoring

Continuous feedback processes serve as good ways to monitor the success of your peer workforce implementation. It is important to make feedback processes available to all of your workforce; peer and non-peer workers. A good way to do this is to conduct regular employee surveys and also be making available an online mechanism for feedback such as a compliments and complaints email or via an online messaging facility.

Evaluation

Your baseline data will provide a platform against which you can evaluate the progress of your Peer Workforce Plan. Regular evaluation will enable you to see quickly if the objectives of your Peer Workforce Plan are being achieved. A number of evaluation tools have been developed that you could use to respond effectively to changes as you continue to monitor and evaluation your Peer Workforce Plan.

Quick Tip

As you periodically analyse the progress of your peer workforce you can use the worksheets in this toolkit to keep you on track.



ATTACHMENT 19 – Useful Evaluation Tools and Guide

Both monitoring and evaluation should be ongoing and scheduled activities. Once you decide how best to stage your program of monitoring and evaluation activities input your schedule in the monitoring and evaluation schedule and [update your plan!](#)



Mental Health Commission
of New South Wales

This resource in the *Employer's guide to implementing a peer workforce* is supported by the Mental Health Commission of New South Wales



1. Peer Workforce Plan

Project Purpose

The purpose of implementing a Peer Workforce Plan as a significant workforce project for your organisation can be defined by working through your *Define your Purpose Worksheet*. This will help you establish what your objectives are and what you hope to achieve in the long term through implementing a peer workforce.

Project Scope Statement

This statement includes a summary of what you have discovered in your *Scoping Planner Worksheet* – what is in scope and what is out of scope. This will be informed by assumptions, constraints and risks.

Project Outcomes

Based on your *Scoping Planner Worksheet* what are the key outcomes you are expecting from implementing your Peer Workforce Plan?

Stakeholders

Based on your *Scoping Planner Worksheet* who are the stakeholders that are critical to the success of your Peer Workforce Plan?

Next page →

Organisational Readiness

Based on working through the *Readiness Checklist* and the *Peer Work Values and Principles Info Sheet* assess your organisations readiness and the actions that need to take place to become ready to implement a peer workforce.

Action Required	Stakeholder Responsible	Dependencies	Timeline	Next Steps

Critical Success Factors

Based on your PESTLE and SWOT analyses capture what you see as the critical success factors to your Peer Workforce Plan

Next page →

Stakeholder Engagement

Define stakeholders and the level of engagement required for each.
Then identify engagement activities suitable for their requirements.

Stakeholders that will:	Stakeholder names	Engagement activities	Level of involvement in the Plan	People responsible	Timelines	Next steps
Inform						
Consult						
Involve						
Collaborate						
Empower						

Next page →

Peer Worker Roles

Now that you have worked through your current and future workforce profiles write out what peer worker roles you will target in the initial phase of implementation of your Peer Workforce Plan.

Gap	Supply		Gap	Demand		Gap				
New or existing role	Current FTE	Risk of job to service	Maintain/ Grow/Decline	Future FTE	Risk of not meeting demand	Is the role meeting needs/ expectations?	Qualifications required	Skill Sets required	Competencies required	Other actions

Next page →

Recruitment Timeline

As you define your peer workforce requirements and approach schedule the recruitment activity below to ensure that you are working to a plan.

Recruitment Step	Timeframe	Process and responsibility	Date completed/by whom
Develop selection criteria			
Prepare position description and advertisement			
Advertise Position			
Position closing date			
Finalise shortlist of candidates for interview			
Interview			
Appoint Candidate			
Offer accepted			
Start date			

Next page →

Managing and Developing your Peer Workforce

The success of your peer workforce is largely dependent on how well you manage your peer workers' performance and support them in their roles and career development. Based on the work you have done with regards to working with your peer workers on their performance review and development plans, capture the important elements that you need to schedule to ensure you regularly make the time for performance management and review.

Recruitment Step	Mid-year review date	Final review date	Status	Required actions
Peer Worker				
Role				
Training and development				

Next page →

Plan evaluation and monitoring schedule

Once you decide how best to stage your program of monitoring and evaluation activities, input your schedule in the monitoring and evaluation timetable below.

Monitoring activity	Timeframe	Process and responsibility	Date completed/by whom

 **Remember to Update your Plan!**



2. Define your Purpose Worksheet

The purpose of implementing a Peer Workforce Plan as a significant workforce project for your organisation can be defined by stepping through the worksheet below. This will help you establish what your objectives are and what you hope to achieve in the long term through implementing a peer workforce.

What is the overall aim of the peer workforce planning project?

What has inspired you to create peer worker roles?

What do you hope to achieve by developing your peer workforce?

What are the unique contributions of peer workers to your strategic vision?

Will your peer workforce include both consumer peer workers and carer peer workers?

How will peer workers complement existing roles?

How will a peer workforce align with your overall strategic mission?

 **Remember to Update your Plan!**





3. Scoping planner

Project name	
Project scope statement	
Introduction/ Background to project	
Business case	
Deliverables	
Assumptions	
Constraints	

Next page →

Dependencies	
Risks	
Key stakeholders	
In scope	
Out of scope	
Project administration, monitoring and reporting	

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



4. Readiness checklist

Yes

No

Do you have a current overarching peer workforce plan?

Do you have an up-to-date strategic plan for the development of a peer workforce?

Do you have an up-to-date operational plan for integrating a peer workforce?

Does senior management and HR support the development of a peer workforce?

Does your executive and senior management have the right skills mix to lead the organisation through the planning for the development of a peer workforce?

Is your management structure well designed to support a peer workforce planning process?

Do you have quality systems and continuous improvement processes to support changes arising from implementing a peer workforce?

Are you actively engaged with your workforce to implement changes from the peer workforce planning process?

Do you have concerns about your future workforce?
And incorporating peer workers?

Do you have processes in place to collect workforce information such as:

- Job roles/classifications
- Full-time equivalent staff (FTE) and/or headcount (the actual number of employees)
- Gender mix
- Employment status (full-time/part-time/casual)
- Age (including time to retirement)

This resource has been adapted from the CS&HISC *Workforce Planning Toolkit*

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



5. Peer Work Values and Principles

This information sheet provides an understanding of:

- Recovery orientation
- Strengths based practice
- Trauma informed care
- Mentally healthy workplaces
- Care aware workplaces

Recovery orientation

Peer work is likely to be most effective in settings that have a pre-existing commitment to the values and principles of recovery. This is also the safest environment in which to employ peer workers. An organisation's policies, vision, mission and values need to incorporate a full recovery vision. The board, senior leadership team and staff also need to understand peer worker roles and the importance of their contribution to recovery.

Becoming a recovery oriented service means including a focus on what is called personal recovery – “being able to create and live a meaningful and contributing life in a community of choice with or without the presence of mental health issues”. Recovery oriented practice refers to the “application of sets of capabilities that support people to recognise and take responsibility for their own recovery and wellbeing and to define their goals, wishes and aspirations”. (Commonwealth of Australia 2013, A national framework for recovery-oriented mental health services: Policy and theory, p.34).

There are numerous resources that can assist organisations to improve their recovery orientation. In 2013 the National Framework for Recovery Oriented Mental Health Services was released ([link](#)). *Living Well: A Strategic Plan for Mental Health in NSW 2014-2024* requires Local Health Districts and community managed mental health services to implement the framework.

Five practice domains are specified with specific capabilities described:

Domain 1: Promoting a culture and language of hope and optimism

Domain 2: Person first and holistic

Domain 3: Supporting personal recovery

Domain 4: Organisational commitment and workforce development

Domain 5: Action on social inclusion and the social determinants of health, mental health and wellbeing

Another resource is the Recovery Oriented Service Self-Assessment Toolkit developed by the Mental Health Coordinating Council and Being to be a recovery oriented service provision quality improvement resource for mental health services ([link](#)).

Changing traditional practice and ways of delivering service can be difficult and, for this reason, the development of a recovery-oriented service framework and an action plan or change management plan to make those changes is recommended.

Strengths-based practice

Many people experience despair and loss of self-confidence and self-belief upon receiving a diagnosis of mental illness and upon experiencing associated negative expectations and social stereotypes. Mental health practitioners and organisations can unwittingly reinforce this despair by a focus on deficits and what the person can't or isn't doing.

An openness and curiosity among practitioners to learn from people with lived experience about what helps and hinders personal recovery is a starting point for the development of strengths-based practice.

Capability 3B Focusing on Strengths and Personal Responsibility in the National Framework for Recovery Oriented Mental Health Services provides a guide to the values and attitude, knowledge and skills and behaviours that might characterise practice and leadership centred on a strengths-based approach ([link](#)).

Important principles in the framework are that recovery is possible, and can be achieved by recognising and using the resourcefulness, resilience and strengths of people with mental illness. A strengths-based service results in people feeling good about themselves and their capacity to take up the responsibility of their own wellbeing. The strength provided by naturally occurring supports and families and close relationships are built on.

Trauma informed

The experience of mental illness in itself is traumatising. Many people then experience mental health treatment as traumatising, particularly involuntary treatment. Additionally, many people with mental illness have experienced previous trauma throughout their lives. Trauma can result from a variety of circumstances and is experienced in individual ways.

The online professional development resource MHPD provides the following explanation:

A basic but essential component of trauma informed care is that the interventions that are provided and the services from which they are delivered do not inflict any additional trauma on the person, or reactivate their past traumatic experiences. (Hodas, 2004, p6).

Trauma informed care is individualised to each person's needs. It aims to understand the trauma and the impact on the person's life, eliminating restrictive practices such as seclusion and restraint, and creating compassionate, non-coercive settings ([link](#)).

Next page →



Before proceeding with introducing or expanding the peer workforce, internal soul searching is required about whether anything that the organisation does results in traumatising or re-traumatising. Users of services and their families and friends are the best advisers here. Practices that traumatise those receiving services are likely to also traumatise peer workers and non-peer workers alike.

A number of organisations including Adults Surviving Child Abuse deliver trauma-informed training, including training for practitioners to safeguard themselves and to recognise and respond to vicarious trauma.

Mentally healthy workplaces for all

A key question for organisations to consider at the planning stage is do human resource management policies and procedures support a mentally healthy workplace and best practice in employment for all, and comply with legal requirements?

There is an abundance of research into what threatens good mental health at work and many resources for employers to draw on to create mentally healthy workplaces. The HeadsUp initiative lists a number of risks to mental health in the workplace. These include challenging work hours, demanding deadlines and targets, heavy workloads, high emotional demands, high physical demands, high mental demands, low levels of control, lack of role clarity, low levels of recognition and reward, poorly managed change, bullying and poorly managed relationships, and discrimination. Addressing these risks is good for peer workers and non-peer workers alike.

The HeadsUp resources guide an organisation in doing this [\(link\)](#). Mentally healthy workplaces are those that address these risks for everyone and undertake activities to create a supportive environment for employees with mental illness.

The Australian Human Rights Commission has also developed a useful resource - Workers with Mental Illness: a Practical Guide for Managers [\(link\)](#). Providing reasonable adjustments is one powerful step an employer is obligated to take to support peer workers. RichmondPRA go one step further by offering the Personal Situation Plan that an employee with lived experience or any other health issue, disability or need can complete.

Carer aware workplaces

The NSW Carers (Recognition Act) 2010 [\(link\)](#) obligates public sector agencies to develop internal human resources policies of with due regard to the NSW Carers Charter. The Charter consists of 13 principles to recognise and support carers in their caring role.

The NSW Carers Strategy was launched by the Minister for Ageing and Disability Services at Parliament House on 7 August 2014. It includes a focus on employment and education. Reforms designed to increase the use of existing workplace flexibility by carers and their employers are expected to lead to outcomes such as carers having choices and opportunities to participate in paid work.

The Commonwealth Government's Carer Gateway [\(link\)](#) advises that employers talk with their employees, while recognising their right to privacy, about what effect being a carer has on their life and work. Solutions like flexible arrangements can

then be worked out together so the skills and experience of the carer are put to best use and the carer can remain in their role. Employers should also be aware of what their legal obligations are, such as those under the Fair Work Act 2009 relating to carer's leave.

The Carers Australia website [\(link\)](#) has an abundance of resources providing advice to employers on how to become carer friendly workplaces. Employers can also sign up to the Carers Australia Work and Care Charter. A Work and Care Self-Assessment Tool is provided to help organisations start discussion about changes that might better support employees with caring responsibilities. It covers four areas: Awareness and Support; Flexible Working; Leave and Working Arrangements; and Recruitment and Retention.

Remember to Update your Plan!

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



6. PESTLE analysis

Political influences	What policy decisions made by governments affect your organisation?	
Economic influences	What impacts your financial assets, liabilities and cash-flow?	
Sociological influences	What population demographics impact on service delivery models?	
Technological influences	What technological influences affect how your service operates and interacts with your stakeholders?	
Legal influences	What legal obligations influence your organisation?	
Environmental influences	What are your organisation's responsibilities for resources and the environment?	

 **Remember to Update your Plan!**



7. SWOT analysis

	Advantages	Your answers	Disadvantages	Your answers
INTERNAL – In relation to current workforce	Strengths <ul style="list-style-type: none"> Current capability? Current performance? Existing resources? Distinctive competencies? 		Weaknesses <ul style="list-style-type: none"> Incapacity? Deficiencies (human)? Deficiencies (resource/financial)? Underperformance? 	
EXTERNAL – In relation to future workforce issues	Opportunities <ul style="list-style-type: none"> Forces Driving Change (PESTLE)? Industry critical success factors? Collaboration? 		Threats <ul style="list-style-type: none"> Forces Driving Change (PESTLE)? Industry critical success factors? Competition? 	

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales.



8. Stakeholder Engagement Planning Process Info Sheet

	Inform	Consult	Involve	Collaborate	Empower
Commitment	We will keep you informed	We will listen to your ideas and concerns and provide feedback on how your input influenced the decisions	We will work with you to ensure that your ideas and concerns are directly reflected in the alternatives developed and show how your input influenced the decisions	We will work with you for direct advice and innovation in formulating solutions	We will actively develop mechanisms that enable you to make decisions We will implement your decisions
Communication Strategies	Intranet Newsletters Email Meeting minutes	Forums Staff meetings Surveys Public comment	Workshops Data collection	Peer Workforce Planning team member Consensus or decision-making meetings	Ballots Delegated decisions

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales.



9. Current workforce profile

	No. of employees			Gender <i>Headcount</i>		Employment status <i>Headcount</i>				Age <i>Headcount</i>				Specific population groups <i>Headcount</i>			Highest level qualification <i>Headcount</i>					
Job role	FTE	% of Workforce	Headcount	Male	Female	Permanent	Temporary	Casual	Contract	< 35	35 – 44	45 – 54	> 55	Aboriginal	Torres Strait Islander	NESB	Nil	Cert. III – IV	Diploma	Degree	Masters	PhD
TOTALS																						

🔄 Remember to Update your Plan!



10: Change management and communication

Following are some useful communication tips to assist you in navigating the change that comes with introducing peer workers and building and maintaining the trust of your workforce:

- **Communicate goals and expectations** – clearly communicate the goals and expectations of introducing a peer workforce to your organisation and what you hope will be achieved.
- **Share information** – share the big picture with your staff and enable them to be informed of the benefits of a peer workforce.
- **Facilitate open communication** – make available channels for open communication such as a feedback email or forum where staff can air their concerns and have their questions answered. Use social media as a communications tool to build engagement.
- **Focus on benefits** – Actively promote the benefits of implementing a peer workforce and the benefits to non-peer workers.
- **Share good news** – Let staff share their stories and positive examples of peer workers and non-peer workers working together. Celebrate achievements.
- **Focus on developing a strong team environment** – Engaging in team building activities and non-work activities as a team helps to build camaraderie and a sense of belonging amongst your entire workforce.
- **Provide feedback on the progress of the peer workforce** – positive feedback on the progress of your peer workforce and how non-peer workers have embraced the change will ensure that the good things will be repeated.
- **Report back on feedback** – it is important to demonstrate that feedback is taken seriously and that action has been taken.

 **Remember to Update your Plan!**





11. Staff satisfaction survey

Please place a tick (✓) in the column which best describes how you feel about your work environment.

Questions	1	2	3	4	5
When I have asked for training to do my job better I have received it in a timely manner					
I have the tools and resource I need to do my job					
When change is taking place I am consulted					
I have a good understanding of what is expected of me					
I feel I am paid the right amount of money for the job I do					
I feel appreciated					
I understand the organisation's values and missions					
I feel that good work is recognised					

Questions	1	2	3	4	5
I think the business morale is high					
I feel that I am kept informed					
I feel that we have strong leadership					
I find my work challenging, interesting and meaningful					

 **Remember to Update your Plan!**





12. Role Development Checklist

Job Title	Department	Award/ agreement	Classification/ level/grade	Is this position currently vacant? If not when?	Reports to	Current working hours e.g. FT, PT, Casual	Is this a new position?	Duties and responsibilities e.g. Communicate effectively with clients and families	Major functions e.g. High level Inter- personal skills – verbal and written	Selection criteria, competencies e.g. At least one years' experience	Qualifications required e.g. Units from the community services training package	Required Experience	Personal attributes e.g. Listen- ing, com- municating clearly, empathy	Essential or desirable e.g. Essential

 Remember to Update your Plan!



13. Position descriptions

You can find examples of position descriptions for peer workers in the following places:

[A Framework for the NSW Public Mental Health Workforce](#): position description templates for seven key peer worker functions:

- Consumer Worker Manager, Local Health District Level
- Consumer Worker Coordinator/Manager, Mental Health Service
- Function of Individual Advocacy
- Function of Peer Support
- Function of Health Promotion
- Function of Education and Training
- Function of Quality and Research.

[Best models for carer workforce development](#): carer peer support workers, carer consultants, carer advocates and carer advisors: position descriptions for the roles of family/carer peer support worker, family/carer consultant, family/carer coordinator, and family/carer advocate and family/carer policy advisor.

Other position descriptions can be found in [A Providers' Handbook on Developing and Implementing Peer Roles](#) and the [Centre of Excellence in Peer Support](#) website.

 **Remember to Update your Plan!**





14. Sample interview questions

Here are some questions that might prove helpful depending on the position's roles:

- Can you tell me some ways that you might use your personal lived experience to support the people you'd be working with?
- What role has peer support or peer workers had in your own recovery?
- This job requires a willingness to share some pieces of your personal story when it makes sense to do so during your work. What do you think about this and is this something you would be comfortable with? Or, Part of the role of a peer support worker is to model recovery by sharing some of your own personal experiences. Would you be comfortable doing this?
- When could you see sharing your story as a part of your work here?
- Do you have any life experiences that would make you valuable to this program?
- What have you learned through your own use of services that you think would be useful to your work here?
- How would you define the 'peer' role and how would you describe its key role or tasks?
- If you were working with someone who has become resigned to the idea that his or her life will always be limited because of a psychiatric diagnosis or other challenges, how would you try to support that person?
- While working here you may be a part of some situations that disturb you or make you uncomfortable. How do you think you would handle these situations, both when they occur and after the situation has ended?
- Can you tell me about a time you experienced a conflict with a co-worker. How did you handle it?^[v]

SOURCE: Lyn Legere, A Providers Handbook on Developing and Implementing Peer Roles, 2015, pp. 50-53.

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



15. Reasonable adjustments

The Australian Human Rights Commission defines reasonable adjustments as 'changes to a job, which can be made to enable a worker to perform their duties more effectively in the workplace'. These adjustments should respond to the particular needs or issues of a worker and can include:

- offering flexible working arrangements (for example, job rotation, variable start and finish times)
- changing some aspects of the job or work tasks (for example, exchanging a single demanding project for a job consisting of a number of smaller tasks)
- changing the workplace or work area (for example, moving a worker to a quieter work area)
- purchasing or modifying equipment.

The Commission provides detailed guidance and practical ways to accommodate workers with a mental illness, whether or not they are peer workers:

1. Identify the 'inherent' (or 'core') requirements of the employee's job.
2. Assess the employee's skills and abilities.
3. Identify reasonable adjustments with the employee.
4. Check that the employee can meet the inherent or core requirements of the job when reasonable adjustments are made.

Further detailed examples of reasonable accommodations to address the effects of a worker's mental illness in the workplace from the Australian Human Rights Commission can be found in its [Practical Guide for Managers](#).

These include flexible working options and strategies to address:

- difficulties with thinking processes (for example, memory and concentration)
- difficulties with organisation and planning
- difficulties with social interaction
- physical symptoms and functioning
- absence from work
- emotional responses

Workplace adjustments are not about changing the roles and responsibilities of the position. Rather they are about changing aspects of the work environment to help the individual perform their role more effectively. It is sensible to discuss any adjustments at the outset of employment and review them on a regular basis.

Reasonable adjustments apply to all areas of employment, including recruitment, selection and appointment, current work, career development, training, promotion and transfers, or any other employment benefit.

Next page →

RichmondPRA provides examples of reasonable accommodation:

- adjust start and finish times owing to effects from medication
- adjust location of desk or office to a quiet area, to a room with a window, to a desk near the door and so on, if the person becomes claustrophobic in confined areas
- registered Pets as Therapy Dogs allowed to attend the workplace
- removing the requirement for a lived experience staff member to have a driver's license in a city where public transport is readily available and the duties can be carried out via these modes of transport
- not requiring a person to do shift work if this can be reasonably and fairly sorted out amongst the remaining staff.

The publication, [Mad Workplaces: a commonsense guide for workplaces](#) about working alongside people with mental illness provides another helpful checklist of reasonable accommodations.

Family/carer peer workers will also, from time to time, require the support of their employer and workplace to balance their work and unpaid caring responsibilities. The Australian Human Rights Commission provides a toolkit for workplaces ([Supporting Carers in the Workplace: A toolkit](#) 2013). The toolkit provides practical suggestions and examples of different kinds of workplace mechanisms to support family/carers in organisations and workplaces of all sizes and types. These examples have been drawn from current practice in 24 countries including Australia. Some of the suggested workplace mechanisms will suit small organisations, while others will be more suitable for large organisations.

Resources for reasonable adjustment

The HTML Managers' Guide: Disability in the Workplace from the [Australian Network on Disability](#) provides comprehensive information for managers on the employment of people with disabilities including the recruitment processes, OHS, disclosure of disability and employee performance and development. Other sources of information are:

[Individual plan AHRC](#)
[Personal Situation Plan Richmond PRA](#)
[Contacting absent employees template](#)
[Managing the possibility of relapse template](#)
[Return to work template](#)

The ReturntoWork website also provides helpful examples of how employees have been assisted to remain and/or return to work when experiencing ill mental health.

Remember to Update your Plan!

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



16. Certificate IV Mental Health Peer Work

Core units of competence

- CHCPW401A Apply peer work practices in the mental health sector
- CHCPW402A Contribute to the continuous improvement of mental health services
- CHCPW403A Apply lived experience in mental health peer work
- CHCPW404A Work effectively in trauma informed care
- CHCPW405A Promote and facilitate self-advocacy

Elective units consumers

- CHCPW406A Work effectively in consumer mental health peer work
- CHCPW407A Support self-directed physical health and wellbeing

Elective units carers

- CHCPW408A Work effectively in carer mental health peer work
- CHCICS304B Work effectively with carers

Additional units

- BSBCMM401A Make a presentation
- CHCICS405B Facilitate groups for individual outcomes

Further course information and resources available at the training.gov.au website.

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



17. Performance concerns

Addressing Performance Concerns

As a manager, you may be unsure how to deal with performance concerns for workers, including workers with a suspected or known mental illness.

You are entitled to apply your standard performance management system to all workers where you have a legitimate concern about their performance.

However, as part of that performance management system, you will need to:

- take into account personal circumstances that may contribute to a worker's performance issue, as you would for all workers
- consider whether a mental illness may be contributing to the poor performance
- consider the seriousness of the performance concern (as for more serious matters, such as violence, there may be no option but to take strong disciplinary action regardless of whether there is a reason, such as a mental illness)
- consider whether the performance concern relates to a key part of the job or if the work could be adjusted to address or avoid a recurrence of the particular concern
- encourage and enable the worker to discuss the performance concern and whether there are any health issues that may have impacted on their performance.

Where a mental illness has already been disclosed to you, discuss with the worker whether their illness has had an impact on their performance and how it can be addressed in future.

Where you already know that a worker has mental health issues (or they raise this during the performance process) it may be advisable to cease the performance management process at that stage. This will enable you to focus on the possible impact of their mental illness in a more a supportive and sensitive manner.

You could, for example, make it clear to the worker that:

- you have a performance concern about them
- their behaviour or performance was unacceptable
- you are aware or suspect they have a mental illness
- you would like to discuss how they see their mental illness impacting on their work and performance
- you are willing to explore whether there are reasonable work adjustments that could be made to accommodate the particular impact of their mental illness without compromising core job responsibilities
- you wish to make it clear that while the behaviour/performance was unacceptable, you are willing to explore whether there are options to prevent it occurring again, rather than it becoming a formal performance management process

- if the performance issues cannot be resolved, or reasonable adjustments cannot be made or do not work, you will need to revisit the issue as a performance concern at that point.

If the worker has not disclosed a mental illness, it is still possible for you to explore ways to adjust their work to try to avoid the performance concern occurring again or to pursue the normal procedures for unsatisfactory performance.

As with all workers with performance issues, you need to:

- address your concerns with the worker in a sensitive manner by identifying work-related adjustments to assist them meet the inherent requirements of the position
- provide a timeline to implement the work-related adjustments
- ensure that you and the worker are both clear about the requirements of the job and standards for performance
- undertake disciplinary action or termination if
 - it is not a result of mental illness
 - it is directly related to performance or an inability to perform the key requirements of the job
 - it occurs after considering whether reasonable adjustments are possible.

If poor work performance continues after the identified timeline you may decide to recommence the disciplinary process with the worker.

SOURCE: Australian Human Rights Commission, Australian Human Rights Commission, [Workers with Mental Illness: a practical guide for managers](#), 2010, pp. 19-20

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales



18. Performance Review

Name

Position

Manager

How to set up your performance development review

- Align goals with organisation and department goals and objectives
- Ensure the goals measure 'what' (performance) and 'how' (values and behaviours)
- Ensure the your organisation's values are built into the goals and measures
- Ensure you develop SMART goals – specific, measurable, achievable, realistic, timeframes

Completing your performance development review

- If it is too early to rate a goal or if no longer relevant as agreed by employee and people manager, use a rating of N/A for that goal
- Use whole numbers (not fractions or decimals) when providing performance ratings
- The overall performance rating is calculated by adding the ratings of each goal and dividing by the number of goals to generate the average

5	Outstanding
4	Commendable
3	Competent
2	Adequate and/or developing
1	Unsatisfactory
N/A	Too early to rate

Next page →



When measuring performance it's not only important to consider 'what' is to be achieved but also 'how' it is to be achieved. The behaviour we demonstrate in a work environment reflects on us as individuals and impacts colleagues and the entire team.

Behaviours that are important to service delivery or that should be focused on by the staff member should be included in the most relevant goal or activity in the performance plan with a tangible measure.
(e.g. Goal: delivers professional service to members. Measure: Demonstrate respect for cultural differences).

		Mid-year review				Final review			
Values	Demonstrated behaviour	Always	Mostly	Sometimes	Needs Improvement	Always	Mostly	Sometimes	Needs Improvement
EG: Pride									
Honesty									
Wellbeing									
Respect									
Accountability									
Teamwork									

**Mid-year
comments**

**Final
comments**

Next page →



Mid-year review comments

Employee

Provide a summary of your performance/achievement of goals to date. Outline any challenges or barriers to success or development you require.

Manager

Provide specific feedback to ensure the achievement of goals/activities. Outline where any improvement is required.

Final review comments and performance rating

Employee

Provide a summary of your performance/achievement of goals for the year. Outline any challenges or barriers to success.

Manager

Provide specific feedback for the employee on their progress through the year, including both projects/tasks and behavioural performance.

Outline where any improvement is required.

Final year performance rating

Average =
Total ratings/number of goals

Next page →



PART 2 - Training and Development Plan

Goal	Actions	Measures	Status
What is the capability you want to develop? e.g. Improve time management	What are you going to do? e.g. restructure my diary to include allocated time for project work and follow up actions from meetings	How will you know you've achieved it? Is it a SMART goal?	Not started/In progress/Completed

Next page →



Signatures

Set up

Employee

Manager

Date

Mid-year review

Employee

Manager

Date

Final review

Employee

Manager

Date

 **Remember to Update your Plan!**



19. Evaluation tools and guides

Following is a list of helpful evaluation guides and tools to assist with routine research and evaluation of peer work programs, services and practices:

Viney, LL et al. 2004, [A framework for consumers evaluating mental health services](#), University of Wollongong, Illawarra Institute for Mental Health.

Murray, C et al. 2001, [Planning and Evaluation Wizard \(PEW\)](#), South Australian Community Health Research Unit (SACHRU).

[Evaluation Toolkit](#), NSW Centre for Program Evaluation and Capability Building.

[Better Evaluation](#): Sharing information to improve evaluation, an international collaboration to improve evaluation practice and theory by sharing and generating information about options (methods or processes) and approaches.

[State Government of Victoria – Evaluation Step-by- Step Guide](#).

 **Remember to Update your Plan!**

This resource in the Employer's guide to implementing a peer workforce is supported by the Mental Health Commission of New South Wales



Mental Health Commission
of New South Wales