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

Centre of
Excellence in
Peer Support

MENTAL HEALTH

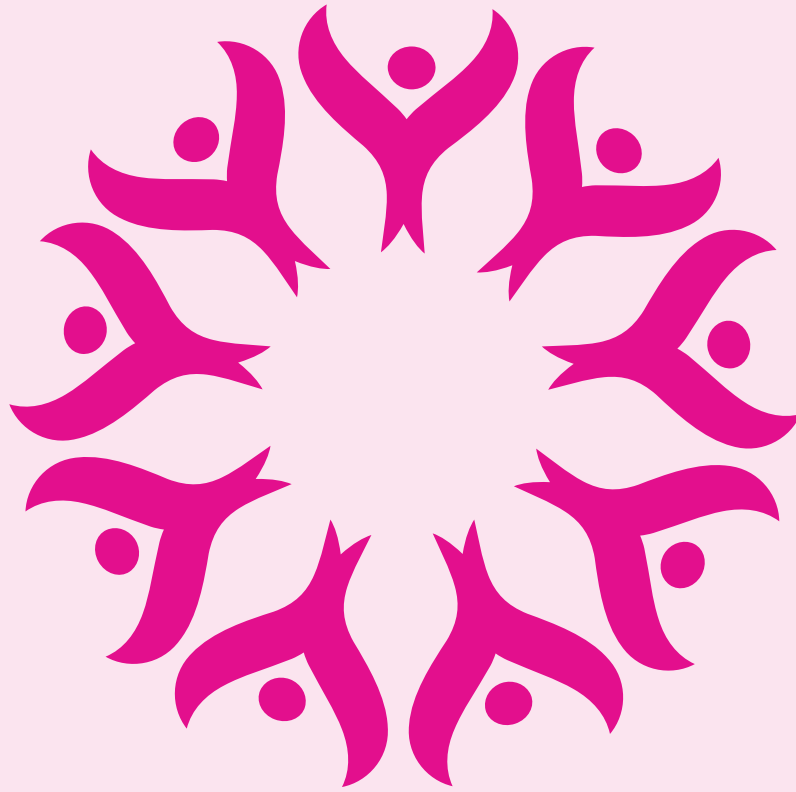# Acknowledgements

Contents

Setting up a
Peer Support Group

Peer support is about sharing your own lived experience with others to help them – and you – work your way through the issues and problems you encounter because of your shared circumstances. Peer support is well established as a valuable way to deal with many issues, and you believe that a peer support group would help other people like you. So, where to start?

This training module will provide you with a set of recommended considerations, rather than a comprehensive list of instructions. This is because individual circumstances will vary a great deal, and it is not possible to predict all those variations and cater for them here. To assist you in gaining clarity around all elements of setting up your new group, it is a good idea to undertake extensive reading. As a starting point, see the Centre of Excellence in Peer Support website, as well as the references quoted throughout this training module, for some useful resources.

In line with peer support guiding principles, you can help by adding your experiences and information to this growing body of knowledge and practice. When your peer support group is established, please document the process you went through and the group details, and then upload it to the Centre of Excellence website for others to use as a resource.

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

Before you take the first steps to set up your own peer support group, we recommend you check that there is not already one operating that can provide the support you are thinking of:

• Contact your local allied/health professional or local council. They should know about the peak body which covers your particular circumstances.

• Do an internet search and/or contact the Citizens Advice Bureau.

• Our Consumer Place and Our Community are also great places to start for useful information.

• Check local neighbourhood houses and community noticeboards to see if a similar group is already running.

• The website for the Centre of Excellence in Peer Support, www.peersupportvic.org, has a directory of peer support groups. There may be a group operating in another region that has similar goals to you, and they can provide assistance to you.

Stage 1: **Planning**

The planning stage is where the foundations are laid for successful groups. Be thorough!

Objectives of the group

Consider why you are planning to set up a new peer support group. Have you been involved with a group of people in similar circumstances, and you want to formalise the arrangement? Or perhaps you have heard that peer support can be very effective in assisting recovery for people with mental health issues?

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

- How many people will it assist?
- What sort of people will it help, and will not help?
- How will you know if it is being successful?
- Under what circumstances would you wind it up?
- What would happen to the group if you moved away, or were no longer able to run it?

"Mutual support is a process in which the people in the relationship strive to use the relationship to become fuller richer human beings."

Mead, S., & Copeland, M. E. (2000). What recovery means to us. New York, United States: Plenum.

Research

Research existing services for your target group, as well as their willingness to respond to peer support. If they are already well served by peer support services, then spend your time and efforts in other ways to enhance their recovery journey. There may be an informal group operating in your region that you can assist, or a nearby one that can be expanded to support your region or specific circumstances.

To do this, check with the peak body as well as local allied health care professionals. Getting in touch with these services also provides a great opportunity to learn about peer support model options.

The term *model* refers to how the peer support is delivered, for example:

- One-on-one 'ad hoc' support
- Regular group sessions – from structured education to informal social meetings
- Support and contact via email, telephone or in person

The peak body which covers your specific circumstances should have information and expertise about appropriate models. Don't forget to ask the people you know in similar circumstances for their input.

Once you have researched potential models and what is happening within your area, you can use this information to clarify your vision for the group. Some groups engage psychologists or other experts to help facilitate meetings; others may incorporate frameworks for support such as Intentional Peer Support; some share a meal together, or go on outings. What kind of group is it that you want to create?

In answering this question, strengthen your vision by creating some examples of what a typical group meeting might look like. Determine the reasons behind choosing the type of group that you have. Your vision will shape the next steps in planning the group – questions of funding, organisational considerations, policy and legalities etc., will have a wide variety of answers, dependent upon the model you have chosen.

Funding

First of all, determine whether access to funding is an essential component of getting your group up and running. To help answer this question, look at what kinds of activities you plan on doing, what materials you might need, and where the groups will be held. The peer support model you adopt will determine how much money you will need to get the group started (capital), as well as ongoing expenses that will be required. Expect to have to cover:

- Administration and supervision costs
- Accommodation and travel
- Room hire or occupancy costs
- Light refreshments
- Promotional and set up costs such as documentation, insurance and legal fees

Depending on the type of group you are setting up, you may not need further funds. For example, peer to peer mothers' groups are limited to closed group members and meetings operate in one another's houses. Or, where an external venue is required, have you thought about an auspice arrangement with for example, a neighbourhood house that could accommodate the meetings?

If you do identify that funding is required, you may need to apply for additional funding from benevolent fund grants, special government grants or other external sources. Sometimes, local businesses will donate funds to support worthy causes too – be prepared to provide a business case to support your request.

"Peer support is intrinsic to mental health and total wellbeing… it provides an unmatched, unlimited pathway to help, in a safe environment, where people's shared lived experiences are heard, respected, honoured and understood."

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

In completing a funding application, consider including current research on the effectiveness of peer support, as it is becoming well established. The website for the Centre of Excellence in Peer Support has a Research Directory which may be helpful here. Also, remember to follow the submission guidelines closely to increase the likelihood of acceptance.

If you have significant spare cash, this may not be an issue! If this is a reasonable option, setting up a Trust may be appropriate – discuss how best to establish one with your lawyer. In this case, consider timeframes; are you willing to fund the group for the next year? 5-10 years?

Organisational considerations

Think about how best to run your new group. Especially in the early stages, a peer support group can be labour intensive. The following questions will help you consider some of the organisational aspects of the group that need to be addressed – write down your ideas, and follow-up with people who may be able to help you.

- Do you have adequate back up if you are ill or want to take a holiday? Who will run the group whilst you are unavailable?
- Can you access the required administrative support to help with photocopying, room hire, thank you notes to speakers, etc.?
- Do you know an accountant or bookkeeper who will provide the treasurer function?
- Who will keep attendance records?
- Is there an external expert you want to engage for their input, advice or assistance?
- Do you need any training to best run the group, such as a short course in peer support work or group facilitation?
- There are legal liability issues to consider too – it is worth obtaining legal advice early in the process.
- Have you considered an auspice arrangement with an existing service? This option could be very helpful in terms of venue, promotion, insurance and general support.

It may well be worth running a trial or pilot program first. It is often easier to test your model and what is required over the short term due to the lower risk in terms of capital and time required.

Stage 2: Setting up

Having decided to proceed with your peer support group, this section will assist you in defining its operations.

Legalities

Formalising your peer support group will involve creating it as a legal entity – this will limit your personal liability if an accident occurs. It may be appropriate to open a separate bank account also. Check with an accredited accountant and lawyer about specific requirements.

If the group is going to be auspiced by an existing organisation such as a neighbourhood house or community mental health service, clarify liability issues with the organisation. Your group and its members may be covered under their insurance policies, and thus creating the group as its own legal entity may not be necessary.

The CEPS Resources Directory provides access to a number of forms and templates useful in setting up a group, such as set up and pack up procedures; group attendance and feedback forms, and crisis management guidelines. You can modify these templates to suit your groups' needs before using.

Policies & procedures

Any formal venture requires a set of internal documentation. These documents will ensure that standards of service delivery, ethical and legal requirements are met.

These do not need to be lengthy, but they should at least cover:

- Cash handling
- Security safeguards
- Privacy of people's information
- Critical incident and/or emergency contact procedures

If you are receiving funds from external sources (such as grants), this documentation will assist with minimising risks – something that most funding bodies and grant schemes will require of you. Our Consumer Place or the Centre of Excellence in Peer Support should be able to help you with examples to work from.

Recruiting people to be involved with your group

First and foremost, don't forget that you are also an integral part of the group. The following questions are just as important to ask of yourself, as they may to ask of the people you recruit to be involved with the group:

Setting boundaries and knowing your own limitations

- What am I prepared to do?
- What am I not prepared to do?
- How can I ensure I maintain my boundaries if they are pushed?

Preserving your own wellness

- Am I well enough to do this?
- Is it the right time?
- Am I doing this for the right reasons?
- What happens if I become unwell?
- What are my self-care strategies?

Personal safety

- Do we need to establish group guidelines?
- Are there eligibility criteria?
- Is the venue in a safe location?
- Will it be safe if meetings take place in the evening?
- Will the group share contact numbers?

It is important to be clear in your expectations and what is agreed for all participants. Here are some things to think about when recruiting people to help you run the group, or to become members:

- You will be working with people with lived experience, so it is important to appreciate the sensitivity around disclosure issues – ensure appropriate privacy guidelines are in place and are followed;
- Be flexible in the hours that you expect people to be available, as they may have mental health issues or care responsibilities which affect their ability to be accessible;
- Not everyone with lived experience is at a stage to be helpful to others. Training may assist some or all members of the group to participate more effectively – check community noticeboards and websites regularly for access to free or low-cost workshops that could be useful.

In regard to training, an accredited Mental Health Peer Work Certificate IV has recently been developed, and could be of interest to people wishing to work in this field. Details of this and other training opportunities are available on the Centre of Excellence in Peer Support website.

Volunteers

Peer support models often have volunteer delivery components. They are very useful in expanding the personnel resource base and assisting the volunteers in their own recovery process. If your peer support model utilises volunteers (including yourself) there are some specific considerations that you will need to address.

Managing and directing people who do not have a financial incentive to conform can be problematic. So, you should be aware of this and be sensitive to their views and needs. In what ways will the volunteer benefit from supporting the group? Instead of payment, they may be volunteering to gain work experience, or build stronger social networks. Thinking about what your volunteers hope to get out of their work can be useful in ensuring their continued involvement. The easiest way to find out, is to ask them!

Consider how you will establish and maintain standards of behaviour with volunteers. Remember, there are liability issues as volunteers acting for your group are regarded as legal representatives, and so your group will be liable for any misdemeanour. If you do intend to utilise volunteers, mention this when you speak with a lawyer as part of the setting up process.

Engaging stakeholders

Stakeholders for your new group include health professionals, potential group members and relevant peak bodies.

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

Why would stakeholders undermine the group?

- Health professionals and allied health professionals may regard peer support as unnecessary
- Potential group members may not understand the value of peer support, or appreciate the particular model you are advocating
- The peak body covering your peer support group will have particular expertise and experience with peer support programs that you are not familiar with, and may be unwilling to promote or endorse your program to its consumers

Effective engagement with all these stakeholders will minimise the potential of any negative impacts.

Ways to engage stakeholders include:

- Keeping in close contact with them on progress
- Seeking input and/or feedback from them
- Incorporating this information into your group model design
- Responding promptly to any concerns raised

Liability issues

To ensure the sustainability of your group, you must consider potential liability issues before getting started. People who deliver peer support often have minimal or no formal training in how to support and / or counsel others. However, as a representative of your group, you are liable for any event that occurs as a result of their actions. It is essential that you have adequate safeguards in place, so that everyone understands their roles and responsibilities. This will minimise the risk of any liability issues arising. See also: *Legalities* (page 5).

Stage 3: Commencing operations

Let's begin! Stage 3 is about the initial and day to day running of your new group.

Promoting the new group

Before your first meeting, you will need to let people know about the new offering. You may already have a list of potential group members who are aware of its forthcoming launch – they will just need to be contacted and provided with details of the time and venue. This may mean phoning, or sending out an (email) invitation.

Beyond this initial invitation, there are a range of options for promoting your peer support group. Which ones you choose will largely depend upon the type of model you have adopted, your target group, and how much you are willing to spend. Promotion can include:

- An official launch event with invited guest stakeholders and press releases to specialist, local or regional media outlets

- Direct notification to stakeholders such as –
  - local allied and health professionals
  - peak bodies
  - local council
  - potential members

- Putting up notices in community houses, libraries, and shopping centres... in fact, anywhere potential attendees may go;

- Placing links or announcements on relevant websites (including www.peersupportvic.org) and blogs.

Networking is an essential part of promotion. It's about building personal connections to help get the word out there. Key people, such as you, can network by attending forums and events, or arranging to meet with other relevant groups, clubs, societies and organisations. Talk to lots of different people and directly promote the new service. Tell everyone what it has to offer, and be charming!

You could also try holding simulations or workshops about how the group will work for interested stakeholders. This will give people valuable insight, and they will be more willing to recommend your new group. You can also offer a trial session for potential group members, so they can see if they like the format before having to commit.

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

Practical housekeeping

Depending on your model, there will be some practical day-to-day requirements for running the group.

Are you going to be...	Then don't forget to think about...
...Running workshops or sessions?	• booking the required rooms with plenty of notice • ensuring adequate toilets, parking, disability access • providing tea, coffee, refreshments & serving facilities • providing pens, paper, photocopies, printed resources • whiteboard & projection presentation needs • tables, chairs and room layout – this can have a big impact on group dynamics, so plan ahead • ensuring relevant police or security personnel have been advised
...Utilising volunteers?	• clarifying points of contact and support for your volunteers • ensuring a smooth set up and responding to questions • assisting in any unforseen drama
...Launching an online or over the phone service?	• the required technology and hardware that should be in place. Trial everything ahead of launch • ensuring there are no last minute glitches • making a plan and identifying where you can go for technical assistance if help is needed
...Aiming for success, with any peer support model?	• keeping an adequate record of attendees & expenses • recording significant progress, outcomes & highlights • evaluating the success of the group & celebrating your achievements along the way

Engaging with group members

For your peer support group to be successful, you must ensure your group meets the needs of members, and that they can recognise the value it provides. For ongoing success, you can do this via regular feedback sessions. Initially, an open dialogue with selected group members will provide helpful insights into how the model is working, and also let members know that their opinions are important.

As peer support involves assisting people in their recovery journey, maintaining boundaries is essential. People experiencing mental distress can be very vulnerable, and may become overly dependant. Whilst professionals are trained to recognise and deal with this, sometimes non-professionals (including volunteers) can become too close to the peer support recipient, causing them to lose objectivity or the ability to effectively support the person. It is important to guard against this by maintaining close contact with people dealing with members. Establishing guidelines to support group members and volunteers will be helpful if any issues arise.

Sustainability

Sustainability refers to the long term viability of your peer support group. This includes having a model that is robust and delivers real value to the group. Other factors that will influence the sustainability of the group include:

• Having access to an ongoing target group that is large enough to justify the program
• Having a target group that is willing to engage
• Utilising a delivery mechanism that maintains the health and wellbeing of everyone involved

Sustainability can be achieved by accessing the peer support community of practice, and by utilising current research to inform all decisions. Many organisations have been successfully running peer support programs for decades and can provide valuable insight. There is also a growing body of research available, particularly in regard to mental health peer support, that can help you develop a sustainable group – having a look through the resources available via the Centre of Excellence in Peer Support is a good place to start.

One key way to ensure a sustainable program is to incorporate ongoing improvement processes that are responsive to members' feedback. Stage 4 takes a closer look at how to do this.

Stage 4: Monitoring

Stage 4 looks at evaluation and improvement processes – these are central to the long-term sustainability of your peer support group.

Evaluation

It is important to maintain robust service statistics. These need not be complicated, but at a minimum service statistics should include:

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

These core statistics will enable you to analyse your model, and determine whether it needs to be altered. For example, sessions held on Tuesday mornings may be much better attended than Wednesday evening sessions. In this case, you might want to consider trialling a Wednesday morning session and dropping the Wednesday evening.

Costs incurred from the service should also be monitored to make sure that the group is running efficiently for the best value.

Qualitative evaluation should also be conducted regularly. Qualitative evaluation looks at descriptions and observations, as opposed to the numbers examined in quantitative evaluation. A good example of qualitative data is the comments collected from feedback forms.

You should offer feedback forms to group members regularly, and review this data by identifying any common themes. This will reveal important information about the effectiveness of the program.

"Coming together…can be an enlightening and empowering experience…Finding the support of others that we can relate to helps us to regain a sense of ourselves, our strengths and our human value."

Our Consumer Place. (2010). So you have a 'Mental Illness'…What Now? Melbourne, Australia: Our Community.

It is worth remembering, however, that one mistake or service user complaint may not be evidence of a need to overhaul the whole program. If several members share the same thoughts about a particular aspect of the group, then it could be beneficial to consider altering your model in response.

Deciding whether or not to implement any such changes may be an item for discussion at formal 'users' group' feedback sessions. These can provide valuable insight if held regularly – twice yearly is a typical frequency. Holding formal feedback sessions directly before or after your support group's usual support meeting will remove the inconvenience of any extra travel for members.

Also seek out and monitor the feedback of those who are delivering / facilitating the peer support sessions, such as your co-facilitator or other helpers. They can advise if the program needs adjustment, based on their direct relationship with the group members.

Drawing upon all the data mentioned in this section, a formal review of the peer support group and whether it is meeting its objectives should be conducted annually.

Reporting

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

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

- Achievement of agreed milestones in budget expenditure
- Number of service users engaged by a pre-determined time
- Engagement of personnel

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