

Focus 2.0

A Publication of The CAFÉ TA Center

Issue 10

What is the Focus 2.0?

The *Focus 2.0* newsletter highlights important issues in mental health, providing timely information on recovery, peer support, and the value of including people with lived experience in the mental health system of care.

Have a suggestion for a topic? Let us know!



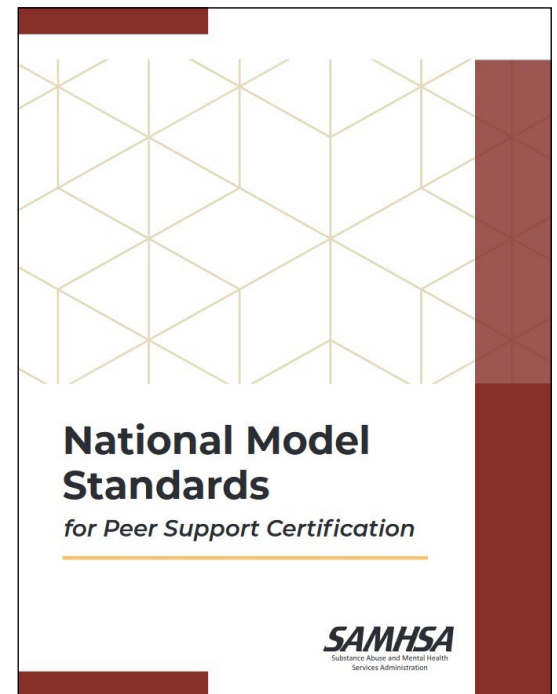
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SAMHSA's New National Model for Peer Support Certification

Just last month, SAMHSA released its long-awaited “National Model Standards for Peer Support Certification.” As described in an accompanying press release (<https://www.samhsa.gov/newsroom/press-announcements/20230606/hhs-publishes-national-model-standards-substance-use-mental-health-family-peer-worker-certifications>), the purpose of creating these national model standards is “to accelerate universal adoption, recognition, and integration of the peer workforce across all elements of the healthcare system.”

These new standards are described in detail in a thirty-page manual that can be found online at <https://store.samhsa.gov/sites/default/files/pep23-10-01-001.pdf>. The model standards include eleven points that are recommended for inclusion in any state or territory’s peer support certification program. They include Authenticity and Lived Experience; Training; Examinations; Formal Education; Supervised Work Experience; Background Checks; Recovery; Diversity, Equity, Inclusion, and Accessibility; Ethics; Costs and Fees; and Peer Supervision.

Historically, different states and territories have been left to develop their own certification standards and processes, their own definitions of terms like



“certified peer support specialist” and “recovery,” and their own strategies to deliver peer support to specific groups like veterans, youth, and families through different classi-



fications within their certification systems. This has resulted in something of a patchwork across the nation, with most certification programs having much in common in their intent and core focus, but differences around the edges that make each unique. It’s also created issues with reciprocity, requiring peer support specialists certified in one state to become certified again when moving to a new state.

It’s important to understand that these new national standards aren’t intended to supplant what has already been developed and implemented at the state level. As the preface notes, the standards “are not intended as a substitute for any state certifications but instead have been developed as guidance for states, territories, tribes, and others, to promote quality and encourage alignment and reciprocity across often disparate state peer support certifications.” The standards don’t include the level of detail and implementation guidance that states have created. Instead, they provide general guideposts on what a peer support certification process should include and account for, with the intent of creating an environment where all certifications have shared minimum standards and understanding of key terms and principles.

As peer support continues to grow as a professional discipline, challenges related to maintaining its core values and centering recovery, mutuality, and self-direction while simulta-

neously integrating the practice into the mental health system of care are likely to continue to emerge. Despite the promise of bringing peer support to scale, there are genuine tensions between the type of organic recovery experience it privileges and more traditional approaches across the mental health system of care. An important means to facilitate the growth of peer support and recovery without losing what makes it effective and unique is strong guidance around standards and best practices like that found in the National Model Standards for Peer Support Certification. Hopefully, both providers and peer support specialists will embrace them, and see them as a tool to bring recovery and peer support to everyone that needs it.



Elected Leaders Confronting Crisis: Can Peer And Recovery Services Help?

As recently reported in Bloomberg (<https://www.bloomberg.com/news/articles/2023-06-03/cities-cite-mental-health-loneliness-and-depression-as-top-policy-concerns>), mental health is at the top of the list of most pressing issues for mayors of cities and towns across the nation. According to a US Conference of Mayors survey, **97% of mayors report an increase in requests for mental health services in their city in the past two years, but 88% lack resources to address the crisis.** Many have responded by creating new projects to address the need, including coordination with crisis line services, crisis response teams, and housing initiatives.

Mental health is also a leading issue for the nation's governors, so much so that the National Governors Association has made addressing it their signature initiative for the year. That body recently released a plan to address youth mental health, with recommendations including investment in mobile response teams, mental health education in schools, focus on growing the workforce, and recognizing the power of peer connection. (See <https://www.nga.org/youthmentalhealth/>.)

With so much focus on mental health on the local and state levels, and elected leaders searching for innovative solutions, **this is the perfect moment for the peer and recovery community to step forward.** To help make that happen, CAFÉ TAC is bringing attention to grassroots recovery-based approaches that are working in communities across the country through its ongoing year-long series of monthly conversations facilitated by national peer leader, CEO of Promise Resource Network, and 2022 Bazelon Center Innovator of the Year Cherene Caraco.

To date, this series has included discussion of three peer-centered, recovery-focused practices in mental health. "Recovery Cafés: Creating Communities of Healing" introduced the Recovery Café model and provided a platform for two experts to share how Recovery Cafés can support recovery, build community, and counter isolation. "Experts by Experience: Paving the Way for Forensic Peer Support" provided a platform for four experts with lived experience to discuss peer support for people in the justice system, unique challenges and opportunities in the forensic space, and strategies to change minds and grow this essential peer support discipline. "Recovery High Schools: Fostering Resilience and Healing" examined the role of Recovery High Schools in supporting the mental health and wellbeing of transition-age youth through a conversation with the Executive Director of a Recovery HS and three of their students. Recordings of all of these conversations can be found at cafetacenter.net/tac-trainings/.

It's clear that the need for new solutions to connecting people with mental health resources is significant, and communities and leaders are searching for answers. Please join CAFÉ TAC in our exploration of innovative peer-based approaches, and consider the difference you can make by bringing your recovery perspective to the table where you live!

Two Legislators Introduce the “Strengthening Medicaid for Serious Mental Illness Act”

New legislation recently introduced in Congress aims to enhance Medicaid services for people with mental health conditions by creating a new Medicaid waiver with associated services just for mental health. The “Strengthening Medicaid for Serious Mental Illness Act” promises to further use Medicaid as a means to support independent living in the community in keeping with the Olmstead decision that established the standard of community-based services in 1999. (Learn more about Olmstead at archive.ada.gov/olmstead/olmstead_about.htm.) Services called for in this draft legislation include assertive community treatment, housing services, supported employment, mobile crisis services, intensive case management, and peer support. Read the press release on this draft legislation at www.gillibrand.senate.gov/news/press/release/gillibrand-and-goldman-introduce-bill-to-support-people-living-with-serious-mental-illness/.



Capacity Corner: A Column about Capacity-Building for Your Peer-Run Organization

CAFÉ TAC is pleased to share this feature, a column from CAFÉ TAC Training Coordinator John Ferrone on leadership challenges within peer-run organizations, where many advocates with lived experience direct their efforts to promote recovery and inspire change.

*This column's topic is **Managing the Challenging Employee**.*

We've all been in that situation (or have seen it) where the manager is having a difficult time with a particular employee.

What types of difficulties? Well, first let me say that there are an infinite number of situations and challenges (i.e., difficulties or challenges) that can arise, and there are almost as many articles and resources available that discuss them. So this article is not an attempt to cover that universe of employee challenges.

Instead, I want to focus on three challenges: 1) A Peer is experiencing a personal crisis that is affecting their work; 2) A Peer is not cooperating because the Peer disagrees with a policy; and 3) A Peer is trying to do their job outside the approved policies and procedures.

These might seem like boring scenarios, but I chose them because their specific variables and responses are applicable to many other situations.

First, let's discuss **the Peer who is experiencing a personal crisis**. As a manager let's assume you are aware of the situation and specifics of this Peer's crisis. You've offered organizational support (meaning you've offered flexibility, perhaps rearranged schedules, possibly shifted work/tasks away to others, etc.). You've also extended your personal shoulder as a form of support, as well as other forms of support as you're able. The bottom line is that this crisis is something that the Peer must work through, and it may take time. You may be forced to decide whether or not the Peer's inability to perform is going to hurt the organization such that you need to exit the Peer from the organization. But before we get to that point, let's discuss an overall framework for approaching this:

1. First and foremost, involve your Human Resource professional if you have one, and it would be wise to share the situation and your approach with your boss.
2. Visit with the Peer and invite them to participate in a timeline planning discussion. The goal is to explain the need for the work to get done, but to also support the Peer through their crisis—ultimately finding a balance and putting it on a timeline with milestones. Be up front that the inability to achieve the milestones (which, by the way, you'll create together with the Peer so there is agreement) may result in the need to remove the Peer from the position.
3. Check in with the Peer on a daily basis to provide support, and to encourage the accomplishment of milestones. If the milestones are slipping by and not being accomplished (one is a data point, two is a trend), then you need to implement an exit strategy.
4. The concept of an "exit strategy" might sound harsh, but it can be done in a way that is supportive. For example, "We're going to place you on a leave of unpaid absence because the organization cannot continue to pay for the role that is not being completed. We want you to come back when you're ready, and then you can resume your role." It's a tough situation, but there would be no reason to write this article and make this point to managers if the situation were easy!

The second situation: the Peer is not cooperating because **the Peer disagrees with a policy**. It's a safe bet that you've probably felt this way yourself where you've disagreed with a policy. What did you do? Following are some steps to take with the Peer who disagrees:



1. First and foremost, involve your Human Resource professional if you have one, and it would be wise to share the situation and your approach with your boss. (Yes, this is always the first step).
2. Visit with the Peer and truly hear them. Listen. Ask clarifying questions (not to make a point, but to truly understand). Document what their perspective is. Then, ask them how they see their perspective playing out if it were implemented. Is it fair? Is it sustainable? Is it consistent with the values and mission of the organization? If the answers to these questions are clearly “Yes,” then perhaps there’s an opportunity to help champion a suggestion for a policy change up the food chain. And if the answers are at best “Kind of” or “Maybe,” then it’s your job as the manager to explain: “The organization isn’t perfect and won’t get it right for every single person the organization encounters. But many Peers have formed this particular policy over many years, and it’s the best thing we have right now. Let’s keep thinking about it, and maybe figure out some improvements, but in the meantime, the stability of the organization and our ability to deliver our Mission and change peoples’ lives and attract new donors depends on all of us pulling in the same direction. Can you understand that, and agree with that, and can I count on you to do that as we give this more thought?”
3. At that point you need to set clear boundaries and expectations, and you need to hold the Peer accountable to them. Perhaps you have a probation process, or some type of formal warning. Maybe you could say, “I really appreciate your passion, so rather than making this a formal warning, let’s just agree to some expectations that I want you to help me create, and I will also commit to problem-solving this with you . . . but the bottom line is that you need to abide by this policy.”
4. Obviously if there is immediate push back, you need to go down a different path that may lead to the Peer exiting your organization.

The third situation is **the Peer who is sort of a maverick and operating outside the boundaries of the policies and procedures**. This one is very difficult, typically, because usually the Peer is getting things done and achieving impressive outcomes with the workarounds. The problem is subtle and may not be visible to most: There is a good chance that a workaround that is outside policies and procedures is creating a possible risk and therefore a liability to the organization, such that if something bad or even tragic were to occur, the organization would fail and close. Here are some steps to take:

1. First and foremost, involve your Human Resource professional if you have one, and it would be wise to share the situation and your approach with your boss. (Yes, this is always the first step).
2. Visit with your boss, possibly a Board representative, and maybe a legal representative. Learn the exact nature of the risk/exposure posed by the workaround, and characterize it in terms of “What-if” scenarios that the Peer will understand. Be sure to be ready to explain the downstream impacts on the organization if



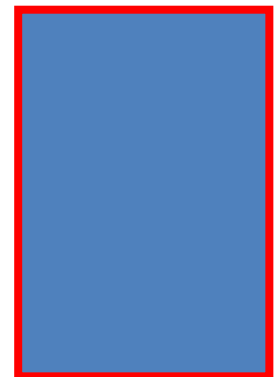
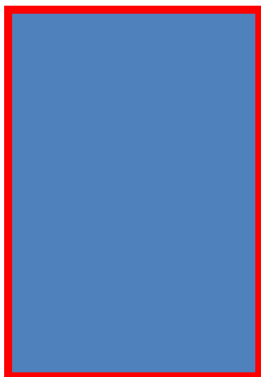
something were to go wrong with the Peer's workaround.

3. Visit with the Peer and first and foremost express appreciation for their innovative approach and their passion for delivering the Mission. Describe how many people are positively affected by the organization, and that they would all be without the organization's services if the organization suffered a liability. Then connect the workaround to the risk of a potential liability, and explain that the policies and procedures are in place to protect the organization. Seek the Peer's understanding as well as their commitment to discontinuing the workaround.
4. If they continue the workaround, you may need to move the Peer to a different role, or perhaps even consider exiting the Peer from the Organization.

You'll notice two similarities in all three scenarios: 1) Always involve your HR professional as well as your boss; and 2) You may need to exit someone from the organization if they are unwilling to follow the corrective action plan—this is something that many nonprofits struggle with, especially Peer-run organizations.

In each of the scenarios there are obviously many more variables, and each situation is unique. The goal in sharing the above is to illustrate a framework of communication, validation, boundary and expectation setting, and accountability. This is the role of the manager across all situations where an employee is creating challenges. Being a manager in a Peer-run organization is a unique role, and hopefully this simple framework for managing challenging employees can alleviate some stress and lead to a stronger work culture.

Is there a leadership challenge you're facing in your peer-run organization or advocacy efforts? We want to hear about it! Reach out to us at cafetacenter@gmail.com with your question or comment. We will be happy to help, and your challenge might just be the subject of our next Capacity Corner column! (Anonymously and with your consent, of course!)



This newsletter was developed under grant number SM082668 from the Substance Abuse and Mental Health Services Administration (SAMHSA), U.S. Department of Health and Human Services (HHS). The views, opinions, and content expressed in this newsletter do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).



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