

Handbook for IPS Peer Specialists

In this handbook, we use male and female identifiers for simplicity, but it is not our intention to exclude the trans community.

How to Use This Manual

This manual was written by peer specialists and peer advocates. Agency leaders can edit the manual or share it as written with employees who are newly hired as IPS peer specialists. Supervisors should review the manual with IPS peer specialists to provide opportunities for them to ask questions. In some situations, supervisor may share this document with the entire team to help them understand the unique role of IPS peer specialists.

IPS stands for Individual Placement and Support. It is a specific type of supported employment program that is evidenced based. This manual may be applicable to peer specialists in other types of employment programs. And information in this manual could be helpful to peer specialists in other roles, such as recovery peer specialists who do not necessarily focus on employment.

The Role of IPS Peer Specialists

Peer specialist refers to members of the IPS unit who have similar life experiences to people who receive IPS services. The duties of peer specialists vary by program location. What is common among peer specialists is that they share how they overcame obstacles to achieve their own career goals, and how they continue to move forward in their own recovery. IPS specialists (the practitioners responsible for helping people with education, finding and keeping jobs) and peer specialists have similar duties.

“Peers break down barriers. When consumers hear my story (where I was and what happened, and where I am now) we have common ground so the person can gain strength and hope that they too can achieve their goals and dreams. Working can be stressful in early recovery – we can discuss any concerns and obstacles in their way and how we can get through them together. Sometimes, just another person on their side to listen to them and say, ‘We will get through this’ can motivate and bring problems into perspective. I, as a peer specialist, am just another person within their support system hoping to see them succeed.”

Diana McSheffrey, IPS peer specialist

“Having a peer specialist has made our IPS team stronger by making sure that we are identifying each person’s strengths and providing strengths-based services. We are more aware of the importance of the impact of everything we say and do with the participant and to our team. Our team is stronger when we are all positive.”

Renee Homolka, IPS Supervisor

Peer specialists place a very strong emphasis on building relationships with people. It is through those relationships that they help people try what may seem impossible to achieve. Only after a relationship is developed are peers able to assist people in taking steps to achieve their career goals.

IPS peer specialists are employed in different settings. For example, mental health treatment agencies sometimes have IPS programs, and employment/rehabilitation agencies may have IPS programs. A new trend is for consumer-operated centers, such as drop-in centers, to develop IPS programs.

**EXAMPLES OF HOW IPS PEER SPECIALIST AND IPS
EMPLOYMENT/EDUCATION SPECIALIST DUTIES MAY DIFFER**

| IPS specialists: | IPS peer specialists: |
|---|--|
| Make multiple attempts to engage people in IPS by calling, visiting people in the community, contacting family members (with prior permission), and mental health practitioners. | Engage people in IPS by sharing how employment has been part of their own recovery and the recovery stories of others they know. They share hopeful messages of how they overcame obstacles to employment. |
| Learn about each person’s work history, interests, education, goals, dreams, current symptoms (if any), strengths, skills, substance use (if any) and other factors that may affect employment. They document this information in the career profile. | Learn about each person’s work history, interests, education, goals, dreams, current symptoms (if any), strengths, skills, substance use (if any) and other factors that may affect employment. Jobseekers may share different information with peer specialists than with IPS specialists. Peer specialists share what they learn with employment specialists who document the information in the career profile. |
| Learn about local businesses by meeting with employers each week to ask about different positions and the hiring preferences of each manager (sometimes referred to as job development). They offer to advocate for job seekers based on each person’s preferences for disclosure. They help with job applications, resumes, etc. | Help with job applications. When job seekers have assignments to complete between appointments with employment specialists, they may offer to help. They provide encouragement and hope to the job seeker. |
| Help IPS participants explore different options for educational and training programs based on their interests and past education. They may also arrange to visit | Talk to the person about what she is learning and how that matches her passions and interests. The IPS peer specialist may also help gather |

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working people with the IPS participant so she can learn about different occupations.

information about different occupations.

Provide individualized education supports such as assistance registering for accommodations, help with a study schedule, assistance learning good study skills, deciding when to drop classes, help with financial aid applications, etc.

Encourage students to attend classes. Asks if students are comfortable asking questions and if they understand class material. Helps students consider different options for managing mental health symptoms while in school.

Provide individualized employment supports based on each person's preferences, past work history, current symptoms (if any), strengths, supports, etc. Supports can include meeting the person to talk about the job, wake-up calls, rides to work, meetings with employers to discuss what the worker is doing well and what can be improved, family meetings to talk about the job, etc. The employment specialist is responsible for writing a job support plan with the working person.

Provide individualized employment supports in collaboration with the employment specialist. May not work directly with employers.

Help only with competitive jobs and mainstream education programs.

May sometimes help people with volunteer positions (depending upon the IPS program), saving for financial goals, learning how to ride the bus, helping with social skills, or other activities based on consumer goals.

Responsible for meeting with state Vocational Rehabilitation counselors at least monthly and maintaining contact between meetings to coordinate services for consumers.

May attend meetings with Vocational Rehabilitation counselors based on consumer choice.

Peer specialists are not intended to be aides to IPS specialists. Ideally, IPS specialists and peer specialists operate as a team (help each other) for their consumers. But peer specialists do their work from a unique perspective. This perspective is one reason that some people find it easier to engage with peers than other professionals. And as the peer specialist engages that person, he can help her develop trust in other members of the IPS team. Peers also act as examples of how people recover from mental health problems—they provide hope to consumers. And IPS peer specialists share examples of how they,

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and others, overcame employment issues related to mental health problems, substance abuse, legal histories, lack of confidence, and other issues. By explaining how they used their own resilience and strengths to achieve goals, IPS specialists provide practical ideas, hope, and inspiration to those who are beginning their careers.

It is important for all mental health practitioners, IPS specialists, and supervisors to understand the role of peer specialists. Strategies that different agency leaders use to educate practitioners are listed below:

- At annual all-staff agency meetings, a peer specialist presents on her role.
- A peer specialist meets with all newly hired practitioners to describe his role and the services he provides.
- Newly hired practitioners shadow a peer specialist during their orientation period. And newly hired peer specialists shadow other practitioners during their orientation periods.
- All peer specialists at the agency meet quarterly. One topic they discuss is how to help other practitioners understand their role. They also meet periodically with upper management teams to ensure that their role is considered as decisions are made about services at the agency.

Professional Boundaries

The professional boundaries written about in this manual may be similar to your agency's guidelines and policies. But because peers share personal information there is more to consider in this regard.

Protect personal boundaries for the sake of IPS participants

The purpose of good boundaries is to protect the people you serve. For example, if someone believes you are a friend, the person may feel hurt when he learns that you only want to have a professional relationship. And IPS participants who feel that they have a personal relationship with IPS peer specialists may worry about sharing certain information. Or if an IPS peer specialist feels obligated to try to meet too many of a person's needs that are not related to employment, he could exhaust himself and become less effective. Finally, peer specialists should model how to have good working relationships similar to the relationships people have with their colleagues.

Inform IPS participants about your role

Be upfront about your role--explain how you help people and what duties are beyond the scope of your position. Set clear expectations. For example, say that you cannot take phone calls outside of work hours. Or explain that you can help with transportation when it is related to the person's work and education goals, but that you cannot provide rides in general. Describe what you do that is different than the employment specialist. Also, while you explain that you cannot keep information private from other practitioners on the IPS team or mental health team you can do your best to communicate with the job seeker about what information you may have provided to the team. Be friendly and positive with the people you serve while remembering that you are in a professional role.

Set healthy boundaries as part of your own self-care

Do your best to leave work at work. Recognize that you cannot be everything for one person. Peer specialists are driven to help people because we empathize when others are in similar situations to ones we have experienced. But it is important to recognize the difference between doing your job well and exhausting yourself by crossing boundaries. For example, a peer specialist learned that someone did not have toilet paper at home and did not have money to buy any, so she bought toilet paper for him. Although it is understandable that she felt sympathetic, she could have instead talked to her supervisor about resources such as food banks to get him what he needed. In the long run, it is better to show program participants how to solve their own problems because you will not be part of their lives forever. Also, you need your income to take care of yourself. You cannot take care of all the financial needs of the different people you will serve.

Another example is that someone may be very distressed about a situation in her life and want to be able to call you at night. Even if the person says she is more comfortable speaking with you than others, explain that you cannot be available in the evenings. Talk to your supervisors to learn if there is a warm line or other resource the person can use. What will help her most is to develop a support network of her own. Also, you need time away from your job to relax and focus on your own life.

Establish fair boundaries with other practitioners

Some IPS peer specialists report that they are frequently asked to drive IPS participants to appointments, grocery stores, etc. Explain to colleagues that you can help with rides but that others on the team should also help with transportation. Ask your supervisor to talk to the team about what peers can do to help with employment and education that is unique. Describe your training and experience to team members so they will understand that you have special skills that should be utilized. Remind them that even though you are happy to help as a team member, IPS peer specialists are not meant to be assistants to IPS specialists. Everyone on the team can share duties such as transportation.

Protect the privacy of others

Never share any information about the people you serve with people not employed by your agency, or with employees at your agency who do not need the information. Be scrupulous about this. Remember that you cannot even say that you provide peer support services to someone, or that the person receives services at your agency, without that person's permission. Below are examples of situations in which you should be careful to protect the confidentiality of program participants.

An IPS peer specialist drove a worker to his job and just after the person went inside, his supervisor came out to talk to her. He reported that the working person had been making too many mistakes on the job. He said that if the worker did not make immediate improvements, he would be fired. The IPS peer specialist felt pressured to explain that the worker had been experiencing a flare up of symptoms and that he was getting better. But she knew that she did not have permission to share that information. So, she told the supervisor that someone would get back to him within a day about the situation. Next, she went back to

the IPS team and described what happened. Later in the day, after the worker had finished his shift, she and the IPS specialist met with the person to discuss the supervisor's complaint and talk about how the worker wanted to handle the situation.

In the example above, the IPS peer specialist did a great job of protecting the person's confidentiality. In order to help the supervisor feel calmer in the moment, the peer specialist listened carefully to his concerns. She also let him know that she would follow up quickly by saying, "I am not sure exactly how much information I am able to share about John's situation, but I will talk to John and we will get back to you tomorrow." Another example is of an IPS peer specialist handling confidentiality issues in a different way is below.

An IPS peer specialist went to a business with a job seeker to apply for work. When they asked for an application, the person at the desk identified himself as the manager and pointed out a computer kiosk the person could use to apply online. As the job seeker completed the application, the manager asked the peer specialist who he was to the job seeker. Because the situation was unanticipated, the peer specialist was unsure what the job seeker wanted to share, so he called her over to explain the manager's question. When the job seeker identified him as a peer specialist from the local mental health agency, the specialist jumped into the conversation to add, "That's right. I assist people who have received treatment and are ready to work. In fact, the job seekers I know have a strong desire to be employed. But each person has different skills and interests. For example, Alice has recently completed her EPA Type I certification in refrigeration and she holds a state HVAC (Heating, Ventilation, and Cooling) license. Alice also has experience in building maintenance although I should let her explain that herself..."

In the situation above, the IPS specialist did not share information about the IPS program or mental health services because he was not sure he had permission to do so. And he refrained from fibbing to the employer by calling himself the job seeker's friend because he knew that if the job seeker was hired, it would be awkward to later explain why he had not been upfront. Instead, he let the job seeker take the lead. Finally, the IPS specialist focused on the job seeker's strengths related to the position she desired.

Issues about confidentiality can also be related to working with families. Let the participant know if a family member calls you and what was discussed. And do not assume that family members know what you know about the person. Be friendly and listen carefully when family members have concerns. Understand that they are worried about someone they love. But do not share information that you are not sure you have permission to share. And consider that in most cases, it is best to talk with families with the person present so that he does not feel that people are talking about him.

Your agency probably has a form called a Release of Information that people

sign to indicate that they have given permission for agency employees to share information with a specific person or with another agency. These forms are dated and eventually expire, so do not assume that once a person has signed a release that the permission is ongoing. Remember that a person's feelings about sharing information may change over time or depending on specific situations. Rather than simply relying on Release of Information forms as indication of the person's consent to share, ask again for each new situation that arises. For example, if a student has signed a release for staff to share information with instructors at the local community college, talk to her each time you think you can help by interacting with an instructor. Does she still feel that this type of disclosure would benefit her? What can be shared and what would she like to keep private? Would she like to be present? Provide examples of what you may say so that the IPS participant can provide feedback about what is acceptable to her.

Do share information that participants relay to you with practitioners at your own agency. Explain to consumers, early in your relationships, that you are part of a team and that you cannot keep information to yourself. For example, "I need to be transparent with your case manager and IPS specialist because we work as a team." Let them know that you will never share information with people who are not involved in their care, or who do not work for your agency, without their written permission.

Ask for help, as needed

Service providers sometimes make mistakes related to personal boundaries, especially when they are new. What is important is to discuss those situations with your supervisor as soon as possible. You can learn from the mistake so that you do not repeat it in the future. And your supervisor may help you think of ways to get back on track with the program participant.

If you know any other peer support specialists (in any type of program), talk with them about different situations you have encountered and how they have managed personal boundaries in their own jobs. Try to learn from each other and support each other.

Share the right personal stories at the right time

The purpose of sharing personal information with people you serve is to provide inspiration and share strategies for how they can overcome similar situations. Only disclose your own history when you believe it will benefit the other person. Try to be conscious about your reasons for sharing your history each time you do so. Be sure that you do not inadvertently share because you are helped by the conversation. Relaying your own experiences is only for the benefit of the program participant.

As you are building rapport with new program participants, you may decide to share general information about your own experiences with employment. Or you may speak briefly about your interests to develop trusting relationships. For example, you may discuss what movies you like or tell a story about your dog. As you know the person better, you will understand more about how your specific employment stories can help the participant.

You may also share different information with different people. For example,

if a participant has more challenges maintaining boundaries (understanding the role of a peer specialist in his life), share less personal information.

Think in advance about what information you are comfortable sharing with jobseekers and workers. Consider if there are any details you prefer to keep private. Ask other peer specialists or your supervisor if you can talk with them about the parts of your history you think you would likely share with program participants and ask for feedback about when those stories could help others.

“I talk about some of the challenges others had regarding employment and ask the person if she is concerned about any similar barriers to employment. If applicable, I explain how I’ve addressed similar issues in the past. I also remind them that even good and positive change is stressful and they may find that they need more support during that part.”

Agape Powell

Use Your Personal Vocational Experiences

As people face different challenges to their education and employment goals, you will sometimes think of a similar experience you had. You may remember feeling the same way or were in a similar situation. You can share parts of your vocational history to inspire others to give examples of different ways to solve problems and to build trust.

Prepare to share your vocational journey

Be aware of your own experiences and how you feel about those. Reflect on each job you have held. Make a timeline of your jobs and include job titles, work shifts, your likes/dislikes about the positions, your successes, challenges, and other factors. Include short-term and long-term jobs. Consider completing the Career Profile that participants in your program also use. This will help you understand what it is like to complete the Career Profile while reviewing your own vocational journey. While completing the career and educational sections, try to identify patterns about your work history. This may help you remember some experiences that will inspire others.

Limit sharing to what is relevant to the person:

As we indicated above, remember to only share about your vocational story when it is relevant, when it is going to inspire hope, or when it will help build trust and rapport in the peer relationship, or when it will provide practical examples. Avoid sharing experiences that you have not yet had time to process yourself. Try not to be specific about the companies or employers you have had bad experiences with since we want to encourage each person to have his own experience, which may be different than yours. Below are some examples of how to share your story:

When a job seeker contemplates what shift she wants to work: “I’m a very routine person and I look for routine schedules because that is best for my mental health. What is your ideal work schedule? What would be best for your mental health?”

“In a retail setting my anxiety is heightened. I know you have shared that you

experience anxiety also; how do you think your anxiety will be affected when you are working at this new job? What coping skills can you use to help you in this situation?

Be thoughtful when sharing your experiences with disclosing personal information

People disclose information about mental health challenges to ask for accommodations at work or sometimes to share personal information with colleagues who become work friends. Before sharing your own experiences, first ask the consumer for his own opinions regarding disclosing and explore those. Then if you decide to share your own experiences with disclosure, have open conversation about how it is different for each person and for each employer. Each consumer has the choice to decide if and how much they disclose at different points in their careers. It can be helpful for people to consider in advance when they will share personal information, with whom, the possible risks and benefits, and what they hope to get out of sharing.

Normalize stressful situations

Your experiences may help people feel hopeful even in the face of setbacks or difficult situations. For example, many new employees are nervous whether they have mental health challenges or not, but they gradually feel better as they become familiar with their colleagues and work duties. You may share how you managed feeling uncomfortable in a new position or coping strategies that helped you. Another example is that if you have ever been fired from a job, you may choose to share that with a person who has recently been let go to demonstrate that it is a common situation, that people learn from their experiences, and then find jobs that are better matches for their skills and preferences.

For more support about how to share your stories:

<http://comingoutproudprogram.org/>

Help People Consider Employment

Some people may have the impression that they cannot work due to past bad experiences with jobs or because mental health treatment staff indicated that they cannot work while a person applies for disability benefits. But desire to work is a strong predictor of success. And IPS teams strive to help people find jobs that will maximize their strengths and minimize the potential for possible problems. An example is helping a person who is nervous in crowds to find a job working alone. You can share stories (without using names) that illustrate how people became successful employees by finding jobs that were right for them.

People who have legal histories may feel sure that employers will not be willing to hire them, but that is not the case. In a large employer survey, 62% reported hiring at least one person with one or more felony convictions. They said that when applicants were honest and upfront about their pasts, explained what they were doing to move their lives forward, and discussed why they were a good match for a position at the business, they (the employers) were willing to believe that the person would not re-offend. To read more about this survey, go to www.ipsworks.org.

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Many people who want to work worry about losing their disability benefits. Family members also have concerns about benefits and working. Ask your IPS team members what resources are available in your area for people to learn about how their benefits will be affected by a return to work. For example, a benefits planner, sometimes called a Certified Work Incentives Counselor, CWIC), maybe available to talk to people about their individual financial situations.

A strategy that seems to help many people consider going back to work is meeting someone who can talk about her own return to the workforce. IPS peer specialists can share how they overcame problems with low confidence or other issues. But it is also beneficial for people to hear different stories since sometimes a particular story will resonate with a person's own experiences. Working people from the IPS program may write about their jobs in newsletters. Or they may visit treatment groups to speak with others in person. Some agencies have annual employment celebration events to recognize those who have gone back to work and working people are invited to share their experiences. And when benefits counselors come to the agency to present on general information about work incentives, working people sometimes speak about their jobs.

When people ask for help with volunteer jobs, peers try to understand if the request is related to low confidence about work. They share a hopeful message, "I believe that you can work at a regular job and be paid for your efforts. Only you know when it is the right time for you to get a regular job. But I know that you have strengths and skills that employers would appreciate. It's your choice, but if you are willing, I would like to talk to you about why I think you could have a regular, paid job that is related to the type of work you would like to do. And if you ultimately decide that you really want to volunteer, someone at the agency will help you with that."

Resources for Information, Tools, and Networking

- Wellness Recovery Action Plans (WRAP) are a way for people direct their own wellness and recovery. To learn more about WRAP go to <https://copelandcenter.com/>. Some people develop WRAP plans specifically for employment. To view a workbooks about WRAP plans for employment, go to www.apse.org or <http://www.apse.org/wp-content/uploads/docs/Wrap%20for%20Work%20Workbook.pdf>
- The Depression and BiPolar Support Alliance (DBSA), Peer Leadership Center at <https://www.peerleadershipcenter.org/plc/default.asp>
- International Association of Peer Specialists at <https://inaops.org/>
- Tips/discussion about how to share your recovery story at <http://comingoutproudprogram.org/>
- National Consumer Technical Center (webinars and resources available for peers) at <https://www.doorstowellbeing.org/>
- Substance Abuse and Mental Health Service Administration at <https://www.samhsa.gov/>