



South Southwest (HHS Region 6)

**MHTTC**

Mental Health Technology Transfer Center Network  
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New England (HHS Region 1)

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# Person-Centered Recovery Planning Consultation Corner Webinar Session 3

*Peer Specialist Roles in PCRPP: Aligning with Peer Ethics and Values*

yale  
program  
for  
recovery  
and  
community  
health



The University of Texas at Austin  
**Texas Institute for Excellence  
in Mental Health**  
*School of Social Work*

# Acknowledgement

Presented in 2024 by the Mental Health Technology Transfer Center (MHTTC) Network.

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At the time of this publication, Miriam E. Delphin-Rittmon, Ph.D, served as Assistant Secretary for Mental Health and Substance Use in the U.S. Department of Health and Human Services and the Administrator of the Substance Abuse and Mental Health Services Administration.

The opinions expressed in the presentation are the views of our speakers and do not reflect the official position of the Department of Health and Human Services or SAMHSA.

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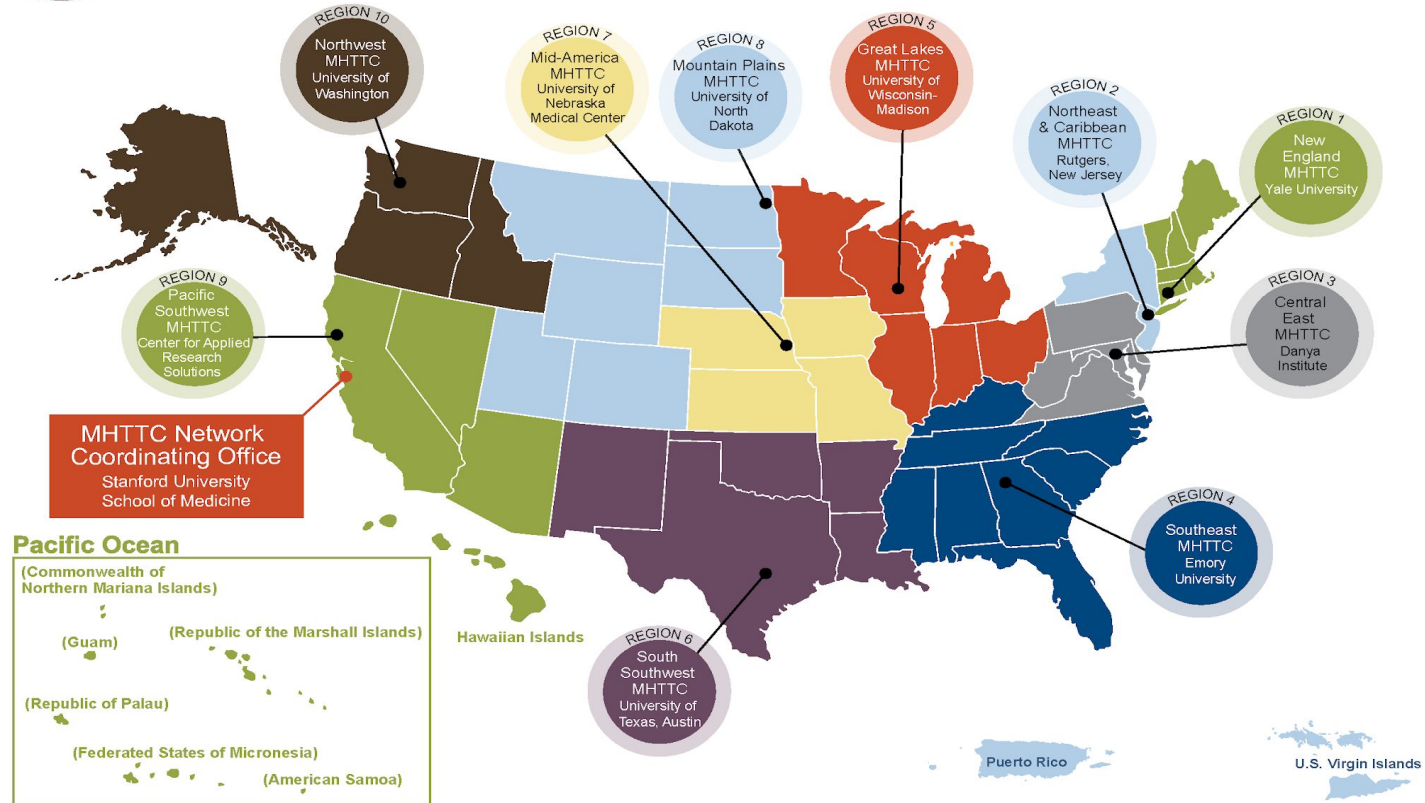
Presented 2024



# MHTTC

Mental Health Technology Transfer Center Network  
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## MHTTC Network



The MHTTC Network uses affirming, respectful and recovery-oriented language in all activities. That language is:

STRENGTHS-BASED  
AND HOPEFUL

INCLUSIVE AND  
ACCEPTING OF  
DIVERSE CULTURES,  
GENDERS,  
PERSPECTIVES,  
AND EXPERIENCES

HEALING-CENTERED AND  
TRAUMA-RESPONSIVE

INVITING TO INDIVIDUALS  
PARTICIPATING IN THEIR  
OWN JOURNEYS

PERSON-FIRST AND  
FREE OF LABELS

NON-JUDGMENTAL AND  
AVOIDING ASSUMPTIONS

RESPECTFUL, CLEAR  
AND UNDERSTANDABLE

CONSISTENT WITH  
OUR ACTIONS,  
POLICIES, AND PRODUCTS

# Housekeeping Items

- We have made every attempt to make today's presentation secure. If we need to end the presentation unexpectedly, we will follow-up using your registration information.
- Attendees are able to unmute and share.
- Have a question or comment? Use the Chat and direct to EVERYONE.
- This session will be recorded.
- A confirmation email will be sent from our South-Southwest email address containing a link to download your CEU certificate.
- CEUs are contingent upon your participation for the full duration of the event based on our Zoom participation logs.
- Registrants are responsible for checking with their licensing or credentialing board to ensure acceptance of the CEUs issued.

# SAMHSA Guidance on Person-Centered Planning

- Hot off the presses, [SAMHSA PCP Issue Brief](#) released April, 2024
- Shared with all State Mental Health Authorities (SMHAs)
- Providing guidance for states related to critical issues that may be addressed by the Community Mental Health Services Block Grant (MHBG).
- *...about strategies for promoting person-centered planning (PCP) to enhance the quality of behavioral health services and the valued recovery outcomes of those that use them.*



## Introduction

Following decades of calls for person-centered approaches to health and recovery from community groups, the landmark 2003 President's New Freedom Commission on Mental Health identified person-centered planning (PCP) as an essential practice that should be "at the core of the consumer-centered, recovery-oriented mental health system."<sup>1</sup> SAMHSA's 10 Guiding Principles of Recovery echo the call for "person-driven" systems where people optimize their autonomy and independence to the greatest extent possible by leading, controlling, and exercising choice over the services and supports with which they engage.<sup>2</sup>

This philosophical commitment to person-centeredness in behavioral health services—and in long-term services and supports for all populations—subsequently evolved into national quality expectations through a series of legislative and regulatory actions that made clear the mandate to provide person-centered care and planning. These include expectations outlined in the Community Mental Health Services Block Grant (MHBG) Program,<sup>3</sup>

## About This SERIES

The Substance Abuse and Mental Health Services Administration (SAMHSA) developed this series to provide guidance to states related to critical issues that may be addressed by the Community Mental Health Services Block Grant (MHBG).

This issue brief provides information for State Mental Health Authorities (SMHA) about strategies for promoting person-centered planning.

Webinar Topic/Title	
Webinar March 27 <sup>th</sup>	PCRP Consultation Corner: Overview and Launch
Webinar April 17 <sup>th</sup>	Co-creation of the PCRP Document: Partnering, Goal Discovery, and Emphasizing Real-life Results
Webinar May 15 <sup>th</sup>	Peer Specialist Roles in PCRP: Aligning with Peer Ethics and Values
Webinar June 19 <sup>th</sup>	Promises and Pitfalls: Designing Electronic Health Records to Support PCRP
Webinar July 17 <sup>th</sup>	Person-Centered Advance Crisis Planning to Maximize Choice and Control
Webinar August 21 <sup>st</sup>	How to Reinforce PCRP in Practice: PCRP Staff Training, Supervision and Quality Monitoring

# The PCRP Consultation Corner is Designed to Help You Meet These Kinds of Emerging Expectations

Click [HERE](#) to Register for Our Upcoming Events



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# Peer Specialist Roles in PCRFP: Aligning with Peer Ethics and Values

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health



The University of Texas at Austin  
**Texas Institute for Excellence  
in Mental Health**  
*School of Social Work*



# Facilitators

**Amy Pierce, MHPS, PSS, ALF (she/her)** is an international trainer and consultant and has been working in the Peer Movement in the state of Texas for over two decades. She currently serves as Recovery Institute Associate Director at Via Hope by serving as a subject matter expert on the implementation of peer services and other recovery-oriented practices. She has extensive experience in the peer support sector, having started the first peer support program in the state hospitals in Texas, working as a peer support worker in a community mental health agency, and the Program Coordinator for a transitional peer residential housing project. Amy also enjoys reading secondhand books in the pool, watching birds in the bay, and being a jungle gym to her two energetic nieces.



**Amanda Bowman, LCSW-S, PSS (she/her)** is a clinical social worker, certified peer specialist supervisor, and WRAP® facilitator, using her professional and lived experience with mental health challenges to promote person-centered practices in behavioral health care. Coming from direct social work practice and administrative leadership within the public mental health system, she joined Via Hope in 2013, where she served as Recovery Institute Director until 2023. In this role, she oversaw the development and delivery of organizational change programs, which included statewide initiatives to support the implementation of person-centered planning, peer support services, and trauma-responsive work environments. As the owner of Sidecar Consulting, Amanda now facilitates collaborative learning events and serves as a subject matter expert for programs designed to support change within and across agencies. Outside of work, you may find Amanda with her family hiking the Barton Creek Greenbelt or enjoying live music.

How about you?  
What hat(s) are you  
wearing today?

Audience  
Participant Poll  
(Multiple Hats Allowed)

Direct support practitioner

Peer support specialist

Supervisor/team leader

Family member/natural support

Guardian/conservator

Leadership/administration

Managed Care/Funder

\*Service recipient/person with lived experience

Advocate

Other ( \_\_\_\_\_ )

*\*A note on our use of terms: Service user/participant, client, person in recovery, patient, person with a disability, psychiatric survivor, person with lived experience, person in distress, consumer. **Always honor individual preferences and when in doubt, ASK!***

# Session Objectives

At the end of the session, participants will be able to

1. Describe a “must do” and a “must not do” related to the role of peer support in PCRCP,
2. Name one way that professional peer support ethics supports a person-centered approach, and
3. Identify two resources to support and promote peer provider role clarity in PCRCP.

# Polls: Where Are We Starting From?

- Rate your understanding of peer support within a behavioral health clinical provider agency
- Check Your Knowledge & Perspective of Peer Support in PCRIP as we get started
  - 4 True/False questions to preview some of what we'll be covering today

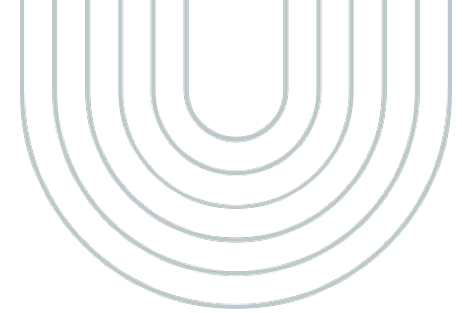


# PCRP: The Basics

# What is Person-Centered Recovery Planning (PCRP)?

Process by which professional services are selected BUT! differs from traditional service planning in these key ways:

- Amplifies voice & choice by the person
- Includes person's identity beyond the BH condition
- Includes recovery plans (actions) beyond professional services
- Measures & values results beyond compliance - emphasizes life in the community as defined by the person
- Communicates an expectation that clinical providers demonstrate person-centered principles, practices and competencies

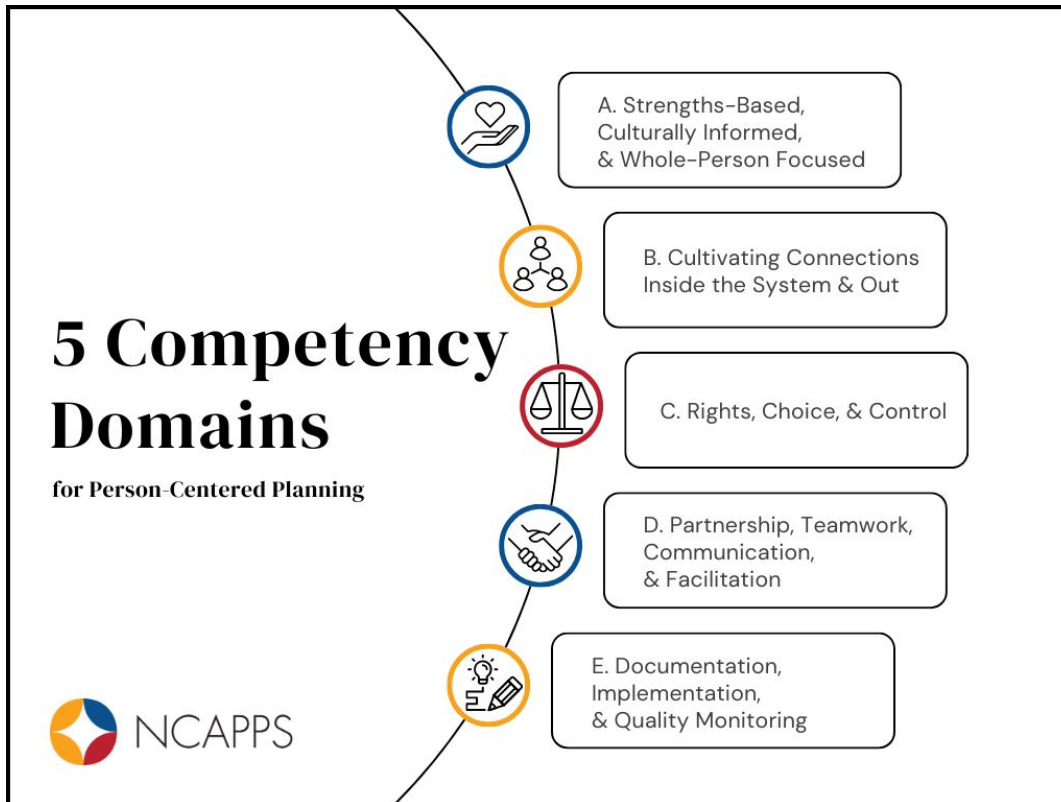


# What is person-centered recovery planning (PCRP)?

Perspective:

We can't know what a person **NEEDS** until we first understand what it is that they **WANT**.

# Five Competency Domains for Person-Centered Planning







# Peer Support: The Basics

# Providers of Peer Support

There are a variety of titles that refer to the same or similar role – even within the same region or agency, such as peer specialist, peer provider, peer professional, peer staff, peer coach, and many more...

*Please share by chat:*

**What is the role called  
in your program or area?**



# Peer Support: A Definition

***Peer support is not based on psychiatric models and diagnostic criteria. It is about understanding another's situation empathically through the shared experience of emotional and psychological pain.***

*When people find affiliation with others they feel are 'like' them, they feel a connection. This connection, or affiliation, is a deep, holistic understanding based on mutual experience where people are able to 'be' with each other without the constraints of traditional (expert/patient) relationships.*

(Mead, 2001)

“I am an expert at not being an expert, and that takes a lot of expertise.” (anonymous)

## Peer Specialists Are Not Clinicians

By Patricia Deegan

### Peer Specialist Perspective

Trained to be advocates for and with participants. Advocacy may include speaking up about participant's needs and goals, and/or coaching participants in speaking for themselves. Advocacy may also include advocating for participant's legal rights, civil rights and human rights.

### Overlap

Both clinicians and Peer Specialists strive to listen carefully to the needs, preferences, goals and aspirations of participants.

### Clinical Perspective

Many are trained in recovery oriented practice which is strengths based, person-centered and aimed at supporting participants in achieving their unique goals.

# PEER SUPPORT

*“Because of peer support I am alive!”*

—Melodie

*“When I saw that other people recovered, it gave me hope that I could too.”*

—Corinna

## WHAT IS PEER SUPPORT?

Peer support encompasses a range of activities and interactions between people who share similar experiences of being diagnosed with mental health conditions, substance use disorders, or both. This mutuality—often called “peerness”—between a peer support worker and person in or seeking recovery promotes connection and inspires hope.

Peer support offers a level of acceptance, understanding, and validation not found in many other professional relationships (Mead & McNeil, 2006). By sharing their own lived experience and practical guidance, peer support workers help people to develop their own goals, create strategies for self-empowerment, and take concrete steps towards building fulfilling, self-determined lives for themselves.

## WHAT DOES A PEER SUPPORT WORKER DO?

A peer support worker is someone with the lived experience of recovery from a mental health condition, substance use disorder, or both. They provide support to others experiencing similar challenges. They provide non-clinical, strengths-based support and are “experientially credentialed” by their own recovery journey (Davidson, et al., 1999). Peer support workers may be referred to by different names depending upon the setting in which they practice. Common titles include: peer specialists, peer recovery coaches, peer advocates, and peer recovery support specialists.

Peer support workers can help break down barriers of experience and understanding, as well as power dynamics that may get in the way of working with other members of the treatment team. The peer support worker’s role is to assist people with finding and following their own recovery paths, without judgment, expectation, rules, or requirements.

Peer support workers practice in a range of settings, including peer-run organizations, recovery community centers, recovery residences, drug courts and other criminal justice settings, hospital emergency departments, child welfare agencies, homeless shelters, and behavioral health and primary care

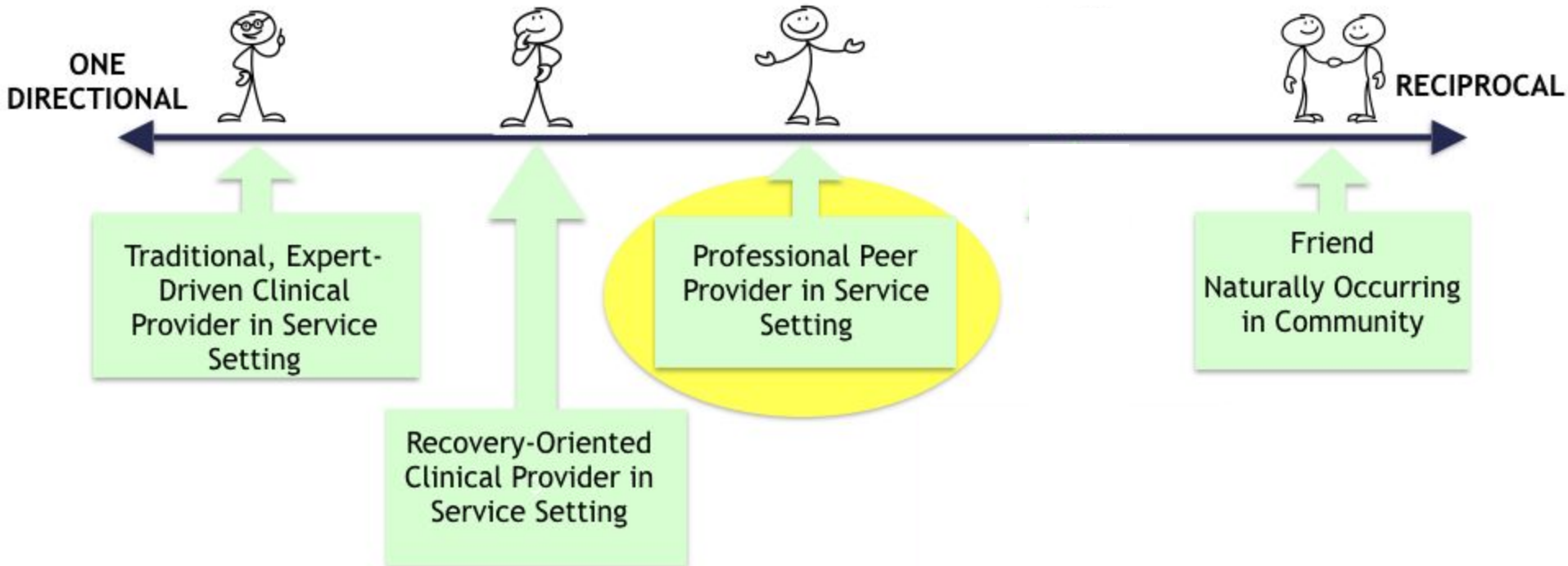
## PEER SUPPORT WORKERS

# Core Competencies for Peer Workers in Behavioral Health Services (SAMHSA)

## Category V: Supports Recovery Planning

1. Assists and supports peers to set goals and to dream of future possibilities
2. Proposes strategies to help a peer accomplish tasks or goals
3. Supports peers to use decision-making strategies when choosing services and supports
4. Helps peers to function as a member of their treatment/recovery support team
5. Researches and identifies credible information and options from various resources

# Continuum of Helping Roles



Adapted from "A Continuum of Helping Relationships" by Davidson, L.; Chinman, M.; Sells, D.; & Rowe, M.: Peer support among adults with serious mental illness: A report from the field. *Schizophrenia Bulletin*, 2006, 32: 443-450.



# Peer Support: The Role in PCRCP

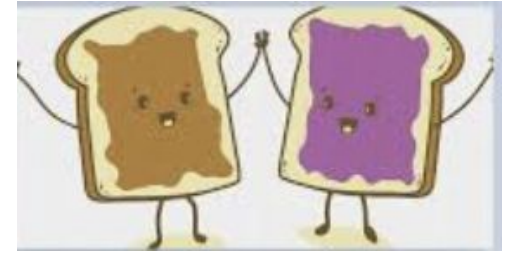


# Please Share Your Ideas!

*In the chat box:*

***How can peer providers support & strengthen the practice of PCRCP at an agency?***

# Peer Support & PCRP: A Natural Complement



The essential function, values & ethics of peer support result in:

- A renewed sense of hope by people in recovery & staff
- People taking ownership of their treatment & lives (if/when that gets diminished over time)
- System improvements that are rooted in practical wisdom & lived experience
- Positive effects that sustain over time and across settings, so even increasing general access to peer services can result in improved PCRP-related outcomes for people in recovery

# Applying Peer Support to the **Top 10** Concerns About Person-Centered Planning in Mental Health Systems

National Center on Advancing Person-Centered Practices and Systems



*In 2012, Janis Tondora and colleagues authored an article outlining The Top Ten Concerns about Person-Centered Care Planning in Mental Health Systems.<sup>1</sup> In this brief, **Martha Barbone**, a member of the NCAPPS Person-Centered Advisory and Leadership Group, describes the role peer support can play in addressing each concern.*



## Concern 3

**Person-centered care planning is time- and labor-intensive and practitioners have caseloads that are too high to allow them the time needed.**

*"I have to complete paperwork on a timeline and we don't have the luxury of discussing everything first – especially when the client doesn't show up half the time! How can I satisfy my supervisor and still do person-centered care planning?"*

## Role of Peer Support



- Support people to prepare for clinical appointments and follow-up afterward to get their questions answered.
- Support includes connecting the community of choice and finding supports outside of traditional healthcare settings.

# About me...



Amy Pierce, CPS

- Individuals fully heard
- Focus beyond medication compliance & acceptance of their illness
- Focus on things that breathed life into people



“I am going to work here.”

# Promote and Honor Self Determination

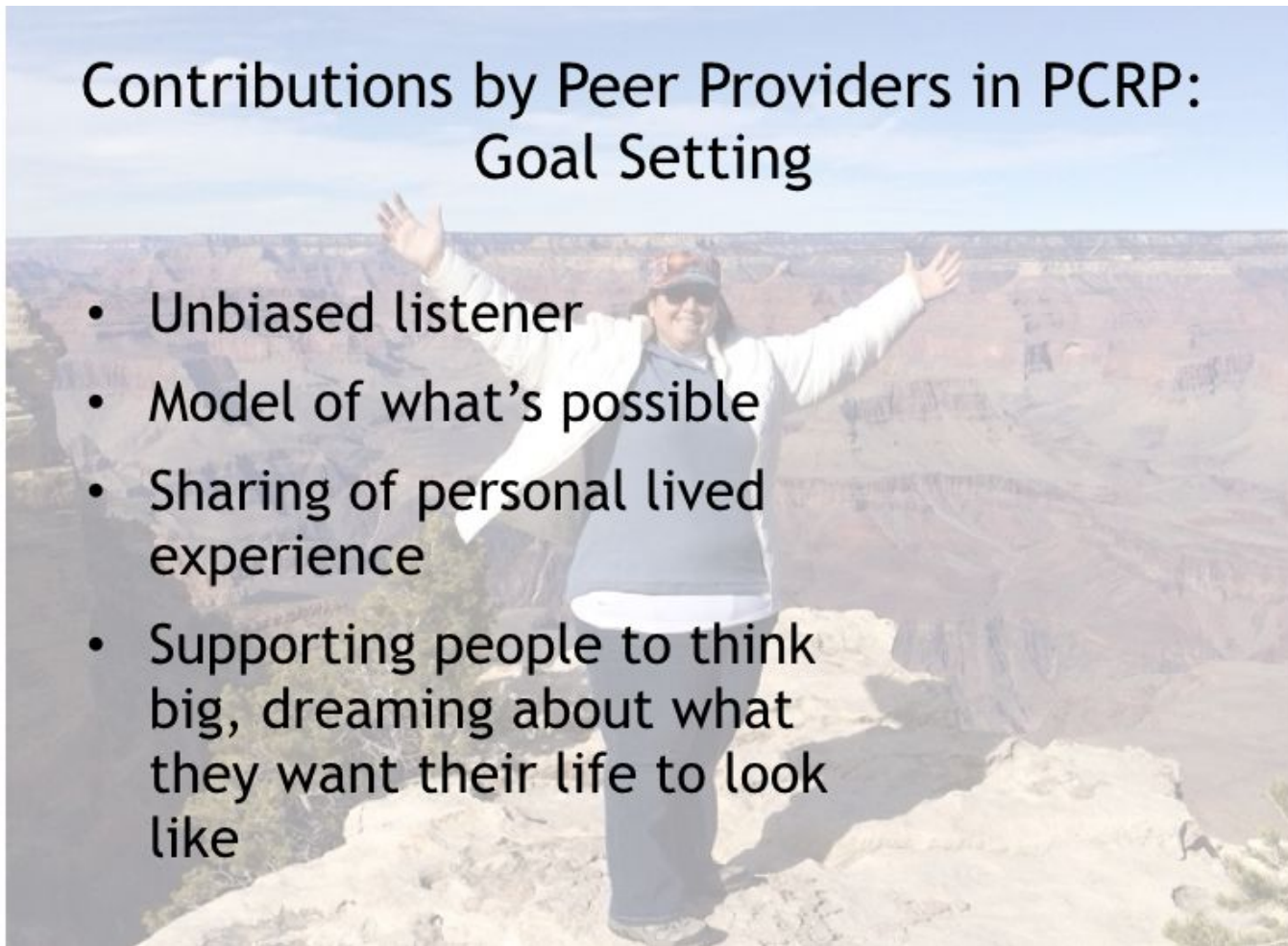
The Primary Responsibility of Certified Peer Specialists is to help people achieve what they want most in their life, their own goals, needs, and wants. Certified Peer Specialists will be guided by the principle of self-determination for all.



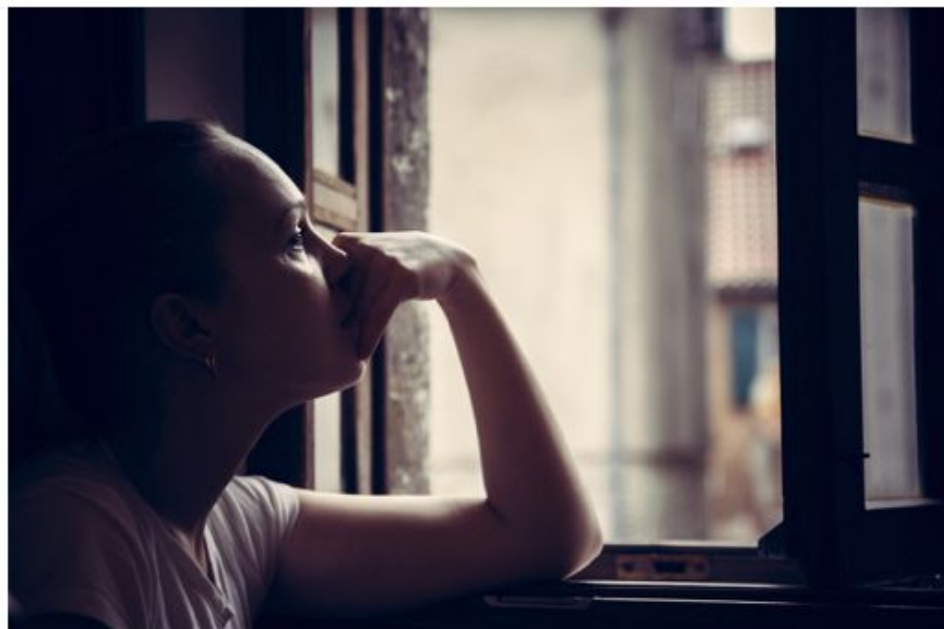
**It's our role to support each individual in their own unique recovery journey as they define it**

## Contributions by Peer Providers in PCRP: Goal Setting

- Unbiased listener
- Model of what's possible
- Sharing of personal lived experience
- Supporting people to think big, dreaming about what they want their life to look like







We understand the sense of hopelessness

Peer providers can join a person when they're in that dark place by...



- Gentle invitation to be courageous
- Exploration of what's possible - from life & services
- Creating a safe space
- Stories of our past to break through a barrier
- Starting from a place of mutuality



“I am the evidence”

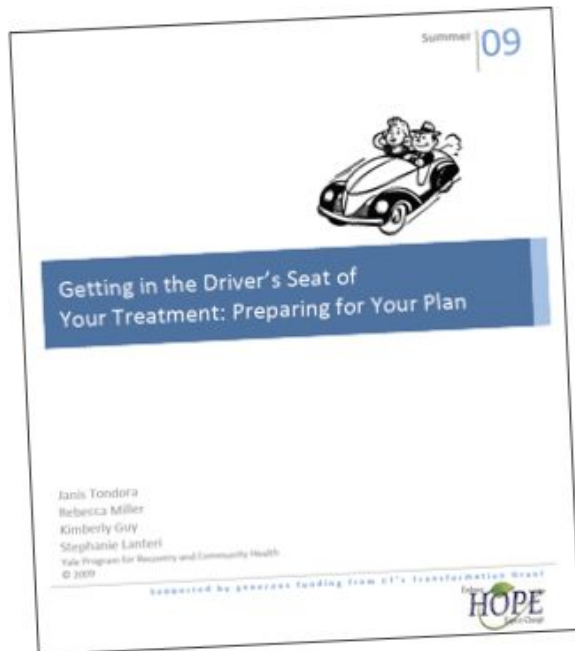


## Contributions by Peer Providers in PCRP: Shining a Light on Strengths

- Look for what is strong in a person, not what is wrong
- Use human experience language
- Honor unique journey of the individual



## Contributions by Peer Providers in PCRP: Preparation for the Planning Meeting

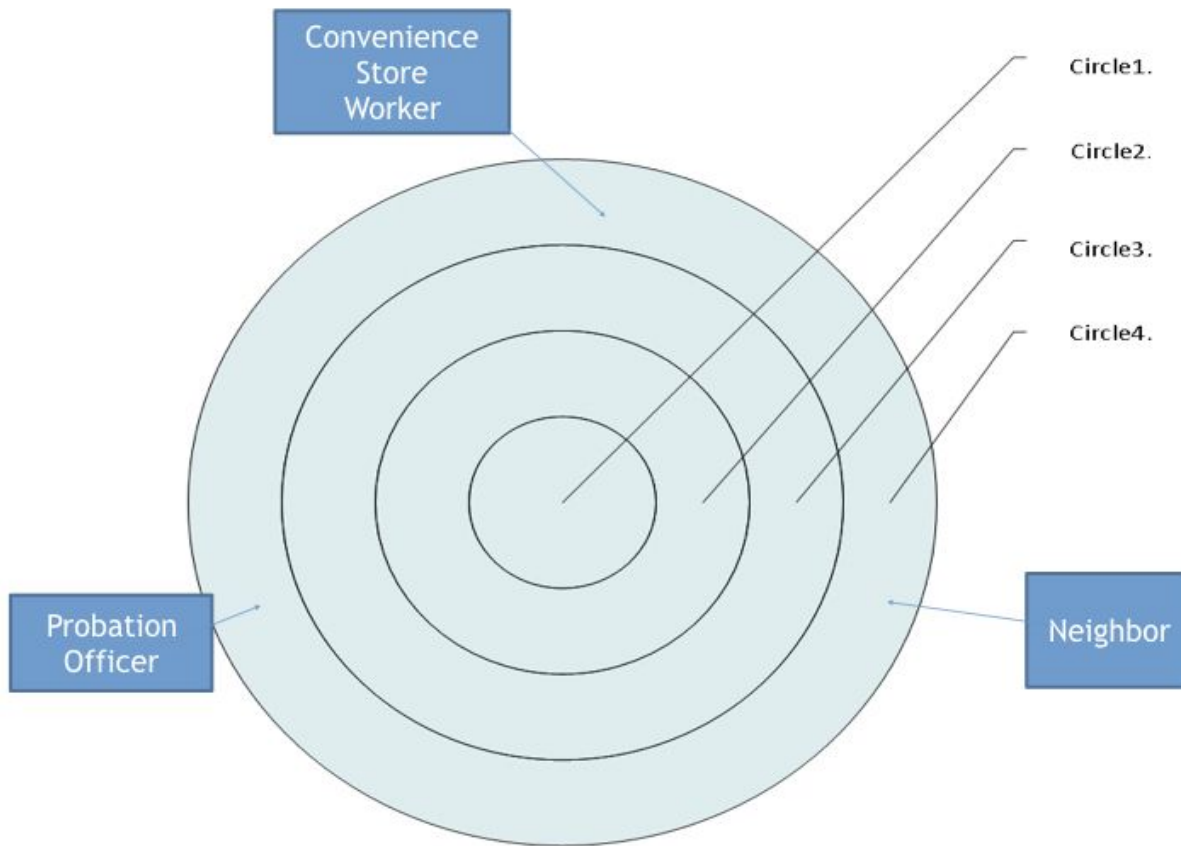


- Pre-meeting exploratory tool
- Supporting the individual in getting connected to what is important to them
- A way to get prepared for the meeting
- Conversation about rights & self-advocacy

Yale Program for Recovery and  
Community Health

© 2009

# Circle of Supports





# Recovery Roadmap

## Goals in Person Centered Recovery Planning

Think of the GOAL on your recovery plan as that BIG trip destination that you might dream about reaching someday. Your goal on your recovery plan should reflect that destination. For example, do you want to get a job? Find a partner and get married? Own your own home? Volunteer in your community? Make some friends? Discover a new hobby? Any of these things make for great person-centered goals if they are important to you! The key thing to keep in mind is that goals ideally are about "thinking big" and working toward a meaningful life desire, not just about reducing symptoms or reaching a treatment benchmark.

Sometimes it is difficult to figure out what goal you would like to work on, and other times you might have been thinking about it for a while. If you need help figuring out your goal, no worries, the Recovery Roadmap and handouts like this one will share some ideas and questions to help you get a sense of what you might like to work on. For now, let's go over a few basics of PCRP goals.

- In PCRP, goals are owned by YOU. In other words, a goal on your recovery plan should be what you want and desire, NOT what anyone else wants for you.
- The goal is expressed in a positive way, in your own words, and is based on your unique interests, preferences, and strengths.
- Your goal MOTIVATES you to move forward toward positive things in your life.
- It should be a long-term, overarching goal that reflects YOUR vision of your life and recovery.
- The goal should give you HOPE and make you feel good about the life you are working toward.

So what would this look like in a goal statement on the Person-Centered Recovery Plan? Below on the left are a few examples of what we would consider a traditional goal on a treatment plan. These tend to be narrowly focused on fixing problems or mental health symptoms. On the right are examples of what we would consider to be person-centered goals. These are focused on more positive life dreams and aspirations.

Traditional Plan Goals: Old and Outdated ☹️	PCRP Goals: New and Improved 😊
Patient will maintain medication and treatment compliance.	"I want to go back to college and finish my degree."
Patient will increase insight.	"I want to have control of and manage my own money."
Patient will reduce behavioral outbursts.	"I would like to live in my own home."

Person Centered Care Planning and Service Engagement (PCCP), Yale University, 2017

## Setting Goals: The following ideas might help you

### State each goal as a positive statement

Express your goals positively—"Have enough energy to take care of my daughter" can be more motivating than a goal of "be less depressed."

### Dream big and break it down

It is important for all of us to allow ourselves to dream. Dreams give us hope, and hope fuels our recovery. But dreams don't happen overnight. It takes hard work, time, planning, and achieving short-term objectives to make it to the end result. Break big goals into smaller ones, and dive in one step at a time.

### Stay positive with yourself

Sometimes as we are working toward a goal, unexpected things may happen. We might lose sight of our goal and get off track. We might find that this goal is not what we really wanted after all. We are allowed to make mistakes and change our minds about goals. Running into problems may not always feel good, but it allows you to learn more about what is important to you. Ask yourself: What about that goal wasn't working? What changes can I make? What supports do I need if when I try again? What is my plan?

### Set priorities

When you have several goals, decide which are the most important ones and which can wait. This helps you focus on the most important things in your life. Don't try to tackle too much at one time!

### Be true to yourself

A goal is based on your hopes and dreams, and not those of others (like parents, society, or even your providers). Sometimes people can have strong opinions and push their ideas of what they think your goals should be onto you. It's ok to listen, but be sure that your goals reflect what you want to achieve.

### Believe in yourself

Believing in yourself and having the hope that you will achieve the goals you set is half of the battle. You are the expert in your life and your recovery.

### Write goals down

This can make them more real and can give them more weight and meaning. Organize your thoughts ahead of time and be firm with your team about what is most important to you.



# Recovery Roadmap

## Discovering Your Personal Strengths

We all have different personal strengths and abilities. Sometimes, when things get tough, we might lose sight of them. Knowing and reminding yourself of your strengths will help you work towards and accomplish the things you want in your life. Take some time to identify your strengths and think about how they might be helpful to you in reaching the goals on your person-centered plan. The following prompts may help you to take stock and/or rediscover some things that you have going for you.



### FINISH THE FOLLOWING STATEMENTS:

1. My best qualities as a person are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. Something I would NOT change about myself is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. I am most proud of \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Inspiring Hope in Goal Setting




# Wellness Recovery Action Plan Advocates for Human Potential, Inc.



## Contributions by Peer Providers in PCRCP: Preparation for the Planning Meeting





# A Story of Peer Support in PCRCP



## Peer Support During the Planning Meeting

- By request of the individual
- May provide a gentle reminder of previous conversations
- Or act as a silent but powerful ally
- Not their role to facilitate planning meeting or create the plan
- May assist with significant communication barriers

## Peer Support As A Billable Service

- Pre-planning conversations may include skill-building
- Skill-building can be a billable service



## Professional Alliance Among Providers



- Emerges over time - discovering how best to work together
- Integrating of peer providers into existing teams
- Intentional team building
- Diverse team of providers = best support for individuals in their journey of wellness



# Exploring Common Challenges

# Please Share Your Ideas!

*In the chat box:*

*Thinking about the role of peer support in PCRPs, what are the challenges or ways that peer support can be undermined?*

# Upcoming TA Session

***Join us on Wednesday, June 5th  
at 1:00pm CST/ 2:00pm EST***

***90-min interactive session to work with scenarios related  
to peer support & PCRP***

***Look for a registration link in an email sent to attendees  
of this webinar!***

# TA Session Preview

## Common Peer Support in PCRP Challenge:

### Voluntary & Self-Directed...Easier Said than Done

#### National Practice Guidelines for Peer Specialists and Supervisors (N.A.P.S.)

CORE VALUE 1

### Peer Support Is Voluntary

Recovery is a personal choice. The most basic value of peer support is that people freely choose to give or receive support. Being coerced, forced or pressured is against the nature of genuine peer support.

The voluntary nature of peer support makes it easier to build trust and connections with another.

CORE VALUE 12

### Peer Support Is Person-Driven

All people have a fundamental right to make decisions about things related to their lives. Peer supporters inform people about options, provide information about choices and respect their decisions.

Peer supporters encourage people to move beyond their comfort zones, learn from their mistakes and grow from dependence on the system toward their chosen level of freedom and inclusion in the community of their choice.

PEER SUPPORTER GUIDELINES	SUPERVISOR GUIDELINES
<p>Practice: <b>Support Choice</b></p> <ul style="list-style-type: none"><li>Peer supporters do not force or coerce others to participate in peer support services or any other service.</li><li>Peer supporters respect the rights of those they support to choose or cease support services or use the peer support services from a different peer supporter.</li><li>Peer supporters also have the right to choose not to work with individuals with a particular background if the peer supporter's personal issues or lack of expertise could interfere with the ability to provide effective support to these individuals.</li></ul>	<p>The supervisor role is to:</p> <ul style="list-style-type: none"><li>Encourage peer support specialists in promoting individuals' choices including becoming more knowledgeable about <b>trauma-informed</b> approaches that reduce or eliminate force and coercion to create a safer environment for all.</li><li>Explore peer support specialists' choices about how they might or might not choose to work with certain individuals, especially if there are issues related to dual relationships or trauma.</li><li>Provide guidance to peer support specialists when they are advocating for choice or speaking up when coercion occurs, especially when it is subtle or sys-</li></ul>

PEER SUPPORTER GUIDELINES	SUPERVISOR GUIDELINES
<p>Practice: <b>Focus on the Person, Not the Problems</b></p> <ul style="list-style-type: none"><li>Peer supporters encourage those they support to make their own decisions.</li><li>Peer supporters, when appropriate, offer options to those they serve.</li><li>Peer supporters encourage those they serve to try new things.</li><li>Peer supporters help others learn from mistakes.</li><li>Peer supporters encourage resilience.</li></ul>	<p>The supervisor role is to:</p> <ul style="list-style-type: none"><li>Provide an environment where peer support specialists are empowered to move beyond comfort zones and learn from their mistakes.</li><li>Reframe unexpected outcomes as opportunities for personal growth, recovery, and resilience.</li><li>Assist peer support specialists in identifying areas for personal growth and creating professional development plans.</li><li>Recognize when the issues a peer support</li></ul>

## TA Session Preview

**Common “Peer Supporters As Advocates”**

**Challenge: Team Expectations**

**Example 1: Appears Wrong, But is Actually Appropriate to Role**



## **TA Session Preview**

### **Common “Peer Supporters As Advocates”**

#### **Challenge: Team Expectations**

**Example 2: Feels Appropriate, But is Actually Contrary to Ethics**

# **TA Session Preview: Common PCRP Challenges that Peer Support Can Address: Finding Your Voice Isn't Always Pretty**



# Conclusions & Takeaways

- Trust that peer support - as long as being done with integrity will ALWAYS support PCRPP
- Educate peer providers about PCRPP practices & standards so they may advocate & participate as appropriate & wanted by the person being supported
- Peer Support common saying:

***“In but not of the system”***

Everyone’s responsibility to honor this

**Closing Q&A...  
Your Thoughts  
and Ideas**



# Evaluation

Scan the QR code to provide your valuable feedback through our evaluation survey.  
Your input helps us improve our services. Thank you for your participation!





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