

Organizational Self-Assessment: Peer Support Services

Introduction

The purpose of this Organizational Self-Assessment (OSA) is to help clinical leadership and staff assess organizational readiness and competencies for delivering peer support services. The assessment is designed for administrators, clinicians, supervisors, QA, HR, compliance, front desk, and anyone else involved in the assessment and planning process.

This tool highlights strengths and identifies areas needing modification to support a recovery-oriented culture and effective inclusion of Peer Support Services. It was adapted from [Organizational Self-Assessment \(OSA\) - PeerTAC](#).

Getting Started

This self-assessment includes competency statements that begin with “Our organization...”. For each statement, select one rating that best reflects your organization’s current practice. An example for each rating is provided in italics.

Next Steps

After reviewing and discussing your responses, reflect on your organization’s strengths and areas that need improvement. Describe action steps you might take to create conditions that better support the inclusion or expansion of peer support services in your organization. In other words, what can you do to increase knowledge and improve the effectiveness of that aspect of Peer Support Services? Who would need to be involved? What action steps need to be taken? How will you know if the action steps have been accomplished?

Part I: Knowledge of Peer Support Practice

1. Our organization recognizes that Peers are uniquely qualified through their lived experience/expertise of recovery.

Needs Improvement – <i>Peers are not viewed as colleagues and their role is less valued than other service providers.</i>	<input type="checkbox"/>
Adequate – <i>Peers are viewed as colleagues with a different specialty than other service providers.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers are respected for their expertise and viewed as an essential part of the service delivery team.</i>	<input type="checkbox"/>

2. Our organization approaches the delivery of peer support services as distinct from clinical practices and supports fidelity to peer support practice.

Needs Improvement – <i>Peers are given tasks outside of their core values and scope of practice such as care coordination or wait list management.</i>	<input type="checkbox"/>
Adequate - <i>Peers are given tasks within their core values and scope of practice.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers are valued for their unique perspectives on recovery, mutual support, peer values, and how peer support practice fits within the team</i>	<input type="checkbox"/>

3. Our organization demonstrates a commitment to recovery by employing people with lived experience of mental health or substance use issues at all organizational levels.

Needs Improvement – <i>Peers are the only people in the organization who openly disclose having lived experience. Others do not feel it is safe to disclose.</i>	<input type="checkbox"/>
Adequate - <i>Peers are not the only people who openly disclose having lived experience. Even those in non-peer positions who have lived experience feel it is safe to disclose.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peer Specialist/Advocate is only one of many positions for which people with lived experience are actively recruited or encouraged to apply.</i>	<input type="checkbox"/>

4. Our organization respects Peers’ concerns related to rights, protection, advocacy, and/or an imbalance of power when providing services.

Needs Improvement – <i>Peers are not oriented to the grievance policies or reporting protocols and do not know how to escalate concerns.</i>	<input type="checkbox"/>
Adequate - <i>Peers are oriented to the grievance policies and reporting protocols so that their concerns are escalated in a timely manner.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers are invited by leadership to share their perspectives and give feedback on how well their concerns are being addressed</i>	<input type="checkbox"/>

5. Our organization addresses the effects of power differentials and related sources of interprofessional tension that can exist between clinical and peer support staff.

Needs Improvement – <i>Peers and clinical staff are not trained on ways to address interprofessional tension resulting from power differentials</i>	<input type="checkbox"/>
Adequate - <i>Peers and clinical staff participate in training on ways to address interprofessional tension resulting from power differentials.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers and clinical staff work together with organizational leadership to assess and address power differentials.</i>	<input type="checkbox"/>

Part 2: Organizational Culture

1. Our organization supports wellness activities and encourages all staff to develop individual and interdisciplinary team wellness plans.

Needs Improvement – <i>Peers are discouraged from sharing their personal experiences with recovery, wellness planning or self-care with other staff.</i>	<input type="checkbox"/>
Adequate - <i>Peers are encouraged to share their personal experiences with recovery, wellness planning and self-care with other staff.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers are encouraged to share with the whole organization and the community.</i>	<input type="checkbox"/>

2. Our organization has at least one committed leader with authority and responsibility to lead the inclusion of Peer Support Services.

Needs Improvement – <i>Peers are not supported or made to feel welcome by organizational leadership.</i>	<input type="checkbox"/>
Adequate - <i>Peers are supported and made to feel welcome by organizational leadership.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers have a dedicated “champion” who oversees the training of staff about peer support roles and the orientation of peer staff to the organization.</i>	<input type="checkbox"/>

3. Our organization regularly seeks input from people receiving services and family members on changes that would improve the organization’s service delivery, particularly in areas of accessible, equitable, culturally responsive, trauma-informed, recovery-oriented, person-centered care.

Needs Improvement – <i>Peers, people receiving services, and family members are not asked for feedback on service delivery.</i>	<input type="checkbox"/>
Adequate - <i>Peers, people receiving services, and family members are asked for feedback on service delivery through standard methods such as satisfaction surveys.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Peers organize people receiving services and family members to advocate for improved access and culturally responsive, trauma informed services.</i>	<input type="checkbox"/>

4. Our organization allocates role-specific resources needed for the professional growth, development, and successful retention of peer support staff.

Needs Improvement – <i>Peers do not have access to professional development comparable to other staff.</i>	<input type="checkbox"/>
Adequate - <i>Peers have access to professional development comparable to other staff.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers receive professional development benefits specific to peer support practice such as time off, travel, and registration costs to attend peer conferences, peer learning communities, or other peer-specific training opportunities.</i>	<input type="checkbox"/>

5. Our organization offers opportunities for advancement within the peer support practice field so that Peers do not need to exit the field to become eligible for promotion.

Needs Improvement – <i>Peers do not have an identified career ladder within the Peer Support Specialty.</i>	<input type="checkbox"/>
Adequate - <i>Peers have an identified career ladder and can advance within the Peer Support Specialty.</i>	<input type="checkbox"/>
Exemplary –	<input type="checkbox"/>

<i>In addition to Adequate (above) Peers can be promoted to leadership positions that carry an equivalent level of compensation and responsibility as other comparable positions.</i>	
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6. Our organization has a plan to address and eliminate stigma, internal bias, and discrimination in every facet of the organization.

Needs Improvement – <i>Peers are not involved in developing the plan to address stigma, internal bias, and discrimination.</i>	<input type="checkbox"/>
Adequate - <i>Peers are sought out and actively involved in developing the plan to address stigma, internal bias, and discrimination.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers are a part of putting the plan into action, which may include sharing lived experiences of stigma, biases, discrimination, privilege, racism and ableism to increase awareness by all staff in the organization.</i>	<input type="checkbox"/>

7. Our organization has policies and procedures to ensure reasonable workloads and work hours for all staff, including Peers.

Needs Improvement – <i>Peers are not educated on the policies and procedures that govern their work hours and workloads.</i>	<input type="checkbox"/>
Adequate - <i>Peers are educated on the policies and procedures that govern their work hours and workloads.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) Peers can recommend changes to policies and procedures that account for the intensity of the work and emotional burden of the peer role.</i>	<input type="checkbox"/>

Part 3: Recruiting, Hiring, Onboarding, and Retaining Peer Support Staff

1. Our organization has created job descriptions for Peers based on established guidelines and scope of practice

Needs Improvement – <i>Peers' job descriptions do not reflect established guidelines.</i>	<input type="checkbox"/>
Adequate - <i>Peers' job descriptions reflect the established guidelines.</i>	<input type="checkbox"/>

Exemplary – <i>In addition to Adequate (above)) - Peer roles have been developed in consultation with peer support professionals and/or peer-run organizations.</i>	<input type="checkbox"/>
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2. Our organization is committed to hiring Peers who have cultural identities and life experiences that are relevant to the people receiving services

Needs Improvement – <i>Peers hired by the organization are not from the same communities and cultures as the people receiving services and/or family members.</i>	<input type="checkbox"/>
Adequate - <i>Peers hired by the organization are from the same communities and cultures as the people receiving services and/or family members.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above)) - Peers are actively recruited not only from the community but from the systems (child welfare, juvenile justice, domestic violence, criminal justice) and cultures relevant to the life experiences of the people receiving services and/or family members.</i>	<input type="checkbox"/>

3. Our organization offers competitive compensation to the Peers we hire (or consult with).

Needs Improvement – <i>Peers receive compensation below what is appropriate for the job role and expectations.</i>	<input type="checkbox"/>
Adequate - <i>Peers receive compensation that is fair and commensurate to the job role and expectations.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above)) - Peers are able to negotiate a fair rate of compensation that demonstrates our organization values having lived experience relevant to the people receiving services and/or family members.</i>	<input type="checkbox"/>

4. Our organization provides flexible work scheduling to the Peers we hire (or consult with).

Needs Improvement – <i>Peers are offered only full-time work on a set schedule.</i>	<input type="checkbox"/>
Adequate - <i>Peers are offered options for full-time, part-time, job-sharing, or other flexible hours.</i>	<input type="checkbox"/>
Exemplary –	<input type="checkbox"/>

<i>In addition to Adequate (above) - Peers have the option to negotiate a work schedule that supports their health and wellbeing and complements the needs of those receiving services.</i>	
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5. Our organization provides on-the-job training that includes shadowing, mentoring, coaching, and exposure to relevant facets of the organization.

Needs Improvement – <i>Peers receive limited orientation, onboarding, or on-the job training.</i>	<input type="checkbox"/>
Adequate - <i>Peers receive an orientation to the organization that covers the mission, vision, policies, procedures, work requirements, and mentoring from within the peer support specialty.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) – Peers are involved in the creation and refinement of orientation and training materials and are exposed to all relevant facets of the organization.</i>	<input type="checkbox"/>

Part 4: Supervision

1. Our organization trains supervisors on the role of the Peers, including how peer support values and practices fit in with the organization’s mission, vision, and values.

Needs Improvement – <i>Supervisors of Peers lack time or incentive to acquire knowledge about the role and practices.</i>	<input type="checkbox"/>
Adequate - <i>Supervisors of Peers have been trained on the peer support role, integrate it into practice, and guide all of their staff on how the values and practices of peer support fit within the overall service delivery system.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) – Supervisors of Peers don’t just talk about the vision for including peer support but lead by example, e.g.: advocating for advancement of peer staff, hiring more peer staff, and/or cultivating leadership from within</i>	<input type="checkbox"/>

2. Our organization trains supervisors of Peers in strengths-based approaches to staff development, performance evaluations, co-supervision, co-reflection, and grievances.

Needs Improvement – <i>Supervisors of Peers do not use strengths-based approaches to the supervision of peer staff.</i>	<input type="checkbox"/>
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Adequate - <i>Supervisors of Peers use strengths-based approaches in the supervision of peer staff.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) – Supervisors of Peers request feedback from peer staff on how well they provide non-clinical, strengths-based feedback and strive to continue to improve all aspects of their supervision.</i>	<input type="checkbox"/>

3. Our organization requires supervisors to provide dedicated supervision in the formats that best meet the needs of the individual Peers and the team.

Needs Improvement – <i>Supervisors of Peers do not provide dedicated time for supervision.</i>	<input type="checkbox"/>
Adequate - <i>Supervisors of Peers provide dedicated time for supervision.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Supervisors of Peers provide supervision in the format that matches the personal and professional needs of each individual</i>	<input type="checkbox"/>

4. Our organization trains supervisors of Peers about the impact of stress, trauma, secondary trauma, and related experiences and how to help affected peer support staff address their work, health, well-being, connections, and work-life balance.

Needs Improvement – <i>Supervisors of Peers are not trained to recognize the impact of work-related trauma and view responses peer staff may be having to trauma or secondary trauma as symptoms of mental illness.</i>	<input type="checkbox"/>
Adequate - <i>Supervisors of Peers are trained to recognize the impact of work-related trauma and help peer staff that are may be responding to trauma or secondary trauma to engage in self-care activities.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Supervisors of Peers provide opportunities for staff to receive training in managing stress and related topics, and hold discussions during supervision and staff meetings on strategies for addressing personal and workplace wellness.</i>	<input type="checkbox"/>

5. Our organization provides opportunities for Peers to receive skill development and task-focused supervision from experienced peer support professionals.

Needs Improvement – <i>Peers with non-peer supervisors are not given the option to receive supervision from an experienced peer support professional.</i>	<input type="checkbox"/>
Adequate - <i>Peers with non-peer supervisors are given the option to receive supervision from an experienced peer support professional.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Peers with non-peer supervisors consult with a peer network or peer-/family-peer-run organization in the community for additional exposure to skill development and guidance on their type of peer support specialty.</i>	<input type="checkbox"/>

6. Our organization ensures that supervisors provide Peers with targeted training in telehealth service delivery.

Needs Improvement – <i>Peers receive little or no training from their supervisor on the delivery of Telehealth peer support services.</i>	<input type="checkbox"/>
Adequate - <i>Peers receive basic training from their supervisor on the delivery of Telehealth peer support services.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Peers receive advanced training and technical assistance from their supervisor or others with expertise on the delivery of Telehealth peer support services.</i>	<input type="checkbox"/>

7. Our organization equips supervisors with the skills and knowledge to train Peers on the required elements for the documentation of delivered peer support services.

Needs Improvement – <i>Peers receive little or no training from their supervisor on how to document Medicaid reimbursable peer support services.</i>	<input type="checkbox"/>
Adequate - <i>Peers receive basic training from their supervisor on how to document Medicaid reimbursable peer support services.</i>	<input type="checkbox"/>
Exemplary – <i>In addition to Adequate (above) - Peers receive individualized training from their supervisor who identifies documentation strategies and technical skills</i>	<input type="checkbox"/>

<i>needed to complete documentation with or without assistive technologies such as audio dictation or voice recognition software.</i>	
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