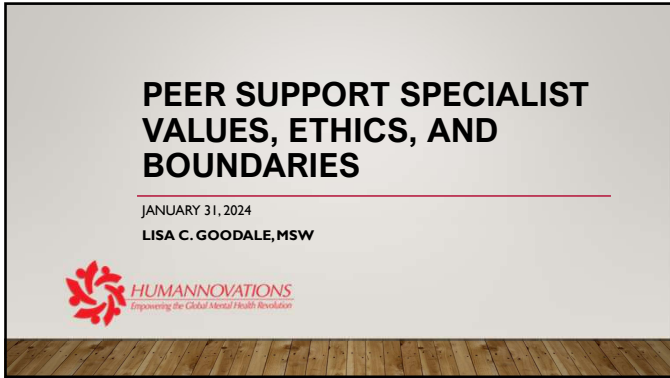




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3

TODAY'S RULES OF THE ROAD

- Stay on video as much as possible and plan to fully attend and participate!
- Participate when invited, via spoken word and chat
- Our schedule: Presentation Part I (9:30-11:30 a.m.) + Presentation Part II (12:30-2:30 p.m.)
- Working Lunch with Participant Assignment (approx. 11:30 a.m.-12:30 p.m.)

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LEARNING OBJECTIVES

After this course, you'll be prepared to:

- 1) Identify similarities and differences between the role and ethics of a Peer Support Specialist and those of clinicians
- 2) Discuss how personal boundaries relate to ethics, for both Peer Support Specialists and supervisors
- 3) Identify personal and agency strategies for productively addressing conflicts involving peer support values and ethics
- 4) Demonstrate provisions of the Nebraska Certified Peer Support Specialist (CPSS) Code of Ethics values and principles with scenarios

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PEER SUPPORT SERVICES TODAY

"Peer support/peer-supported services can be found across the world. Peer support/peer-supported services include inpatient, outpatient, digital, and community-based services for people with mental health conditions and/or substance use challenges by individuals who identify as experiencing similar lived experiences. More than 30,000 peer support specialists (also called: peer providers, peers, peer specialists, peer supporters, peer mentors, peer navigators, certified peer support specialists) in the United States offer Medicaid reimbursable services in 43 states. The spread of peer support and its growth in evidence related to the effectiveness for service users have led to major advancements."

An Update of Peer Support/Peer Provided Services Underlying Processes, Benefits, and Critical Ingredients. Karen Fortuna, et al. *Psychiatric Quarterly* 2022

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PEER SUPPORT SERVICES TODAY

Peer Service Activity Domains

Promote hope - Serve as role model - Share recovery story - Help reduce isolation - Do recovery planning - Have flexible time and meeting places - Engage clients in treatment - Increase client's participation in own illness management - Help link clients to community resources - Serve as liaison between staff and clients - Increase access to services - Run recovery groups - Focus on strengths - Provide empathy - Promote empowerment - Develop trusting relationship - Teach coping skills - Teach problem solving - Help their team focus on recovery

An Update of Peer Support/Peer Provided Services Underlying Processes, Benefits, and Critical Ingredients. Karen Fortuna, et al, *Psychiatric Quarterly*, 2022

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PEER SUPPORT SERVICES TODAY

Peers in Research Settings

"Literature concurs that peers' efficacy relies on their ability to relate to the experiences of those whom they help. This places peers in a unique position to observe and acknowledge subtle changes in participants' outlook and behaviors, which may be imperceptible to the research team."

Keeping the Peer in Peer Specialist When Implementing Evidence-Based Interventions. Carolina Vélez-Grau, et al, *Health Social Work*, 2019

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PEER SUPPORT SERVICES TODAY

"For consumers, families, and treatment professionals, the increasing availability of peer support services in the traditional mental health system can enhance current services ... [w]ithin systems that often have too few resources, peer support services place a premium on **developing relationships, on guiding patients through fragmented systems** to the needed treatments, and on **promoting development of a full life beyond illness management.**" *[bold type added]*

Peer support services for individuals with serious mental illnesses: assessing the evidence. Matthew Chinman, et al, *Psychiatric Services*, April 2014

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WHAT'S IN A NAME?
TERMINOLOGY USED & SHARED BY MANY PROFESSIONS

- Values
- Practice Standards
- Practice guidelines
- Core competencies
- Ethical guidelines / Code of Ethics

Guidelines or Rules?
Mandatory or Optional?

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CODES OF ETHICS
THOU SHALT
OR SHALT NOT?

11

**National Practice Guidelines for Peer Supporters
National Association of Peer Supporters (NAPS)**

PRACTICE STANDARDS are rules or guidelines used as the basis for informed decision-making about acceptable work performance and practices. They are established by an authoritative entity through a collaborative process with input from a wide range of people who perform the work. Standards are based on values, ethics, principles and competencies.

Having a core set of standards is one important way to legitimize a field of practice. Practice standards generally have three basic components: 1) practice guidelines, 2) identification and description of core competencies and 3) ethical guidelines or code of ethics.

Adapted from Wilma Townsend, Pillars of Peer Support presentation (2012)

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National Practice Guidelines for Peer Supporters National Association of Peer Supporters (NAPS)

Peer support is:

- Voluntary
- Mutual and reciprocal
- Equally shared power
- Strengths-focused
- Transparent
- Person-driven

Peer supporters are:

- Hopeful
- Open-minded
- Empathetic
- Respectful
- Honest and direct

Peer supporters

- Facilitate change

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NATIONAL MODEL STANDARDS FOR PEER SUPPORT CERTIFICATION ~ MODEL STANDARD #9: ETHICS

Standards call for

Codes of Ethics [that] include, but are not necessarily limited to, ethical standards that require agreement/attestation to:

- The defined role, scope, and responsibilities of the peer
- Maintaining personal and professional boundaries
- Preventing conflicts of interest
- Confidentiality
- Mandated reporting

Substance Abuse and Mental Health Services Administration (SAMHSA), 2023

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NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS

The purpose of the Certified Peer Support Specialist (CPSS) Code of Ethics is to outline the basic values and principles of peer support practice. The code shall serve as a guide for the CPSS in the State of Nebraska by defining professional responsibility and ethical standards for the profession.

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NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS, *CONTINUED*

The primary responsibility of the CPSS is to help Peer Support recipients to achieve their own recovery needs, wants, and goals. CPSS may have other duties as assigned as per their employer and their job description. The CPSS will maintain high standards of personal conduct and will conduct themselves in a manner that fosters their own recovery. CPSS will be guided by the principle of self-determination for all and shall serve as advocates for the people they serve.

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NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS, *CONTINUED*

The CPSS will perform services only within the boundaries of their expertise. The CPSS shall be aware of the limits of their training and capabilities and shall collaborate with other professionals to best meet the needs of the person(s) served. The CPSS will, at all times, provide an objective and professional relationship while recognizing there are multiple pathways to recovery.

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PROVISIONS: NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS (14 TOTAL)

1. The primary responsibility of a CPSS is to help individuals achieve their own recovery needs, wants, and goals. Certified Peer Support Specialists will be guided by the principle of self-determination for all.
2. The CPSS will maintain high standards of personal conduct. The CPSS will also conduct themselves in a manner that fosters their own recovery.
3. The CPSS will openly share with consumers and colleagues their own recovery stories from behavioral health challenges and will likewise be able to identify and describe the supports that promote their recovery.
4. The CPSS will, at all times, respect the rights and dignity of those they serve.
5. The CPSS will never intimidate, threaten, harass, use undue influence, physical force or verbal abuse, or make unwarranted promises of benefits to the individuals they serve.

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PROVISIONS: NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS

6. The CPSS will not practice, condone, facilitate or collaborate in any form of discrimination on the basis of ethnicity, race, sex, sexual orientation, age, religion, national origin, marital status, political belief, mental or physical disability, or any other preference or personal characteristic, condition or state.
7. The CPSS will advocate for those they serve that they may make their own decisions in all matters when dealing with other professionals.
8. The CPSS will respect the privacy and confidentiality of those they serve.
9. The CPSS will advocate for the full integration of individuals into the communities of their choice and will promote the inherent value of these individuals to those communities. The CPSS will be directed by the knowledge that all individuals have the right to live in the least restrictive and least intrusive environment.

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PROVISIONS: NEBRASKA CERTIFIED PEER SUPPORT SPECIALIST (CPSS) CODE OF ETHICS

10. The CPSS will not enter into dual relationships or commitments that conflict with the interests of those they serve.
11. The CPSS will never engage in sexual/intimate activities or relationships with the consumers they serve.
12. The CPSS will not abuse substances under any circumstances.
13. The CPSS will keep current with emerging knowledge relevant to recovery, and openly share this knowledge with their colleagues.
14. The CPSS will not accept gifts of significant value from those they serve.

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CPSS AND CLINICIAN CODES OF ETHICS

- What's the same?
- What's different?

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STANDARD OF CARE

"What a *reasonable* and *prudent* professional, with the same or similar training, should have done under the same or similar circumstances."

Fredric Reamer, PhD

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THE "GUT TEST" (WHEN SOMETHING JUST DOESN'T "FEEL RIGHT")

Identify the discomfort:

- Is the action wrong (unethical), or simply uncomfortable? Unfamiliar?
- Am I making a case for taking an action, or working too hard to rationalize what I want to do?

"I don't want to hurt their feelings"

"I don't want to jeopardize our relationship"

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BOUNDARIES

- Professional boundaries
- Agency boundaries
- Personal boundaries

Are they always the same?

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LUNCHTIME EXERCISE: MY CPSS OR CLINICIAN ETHICS AND BOUNDARIES

Write your own boundary document/statement on the form provided:

- What professional and/or agency boundaries do I value most highly?
- What personal boundaries do I have that are more stringent than my professional or agency boundaries?
- What personal boundaries do I have that may conflict with my professional or agency boundaries?

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SITUATION I

Situation: CPSS Maggie regularly attends a local mutual support group meeting which she regards as an essential part of her personal recovery. Joan, another support group attendee, becomes a client of the agency where Maggie (the only CPSS on staff) works.

What CPSS CoE principle(s) is/are involved?

Can Maggie serve as Joan's CPSS? Do Maggie or Joan have to stop attending that support group?

Boundaries: Professional, Personal, Agency

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SITUATION 2

SITUATION: CPSS Gregory works with client Maryellen whose family and friends cut ties with her due to her past drug use and are no longer in contact with her in any way. She often states that she has no friends and once told Gregory that he is the only one who cares about her. During an appointment, Gregory and Maryellen are talking about the possibility of her participation in a substance use treatment program, and Maryellen asks Gregory if he ever attended that program and what he thinks of it. Gregory has in fact attended that program in the past and does not wish to share that information. But he is worried that if he refuses to answer, it will set Maryellen back and be detrimental to their relationship as CPSS and client.

What CPSS CoE principle(s) is/are involved?

Is it an ethical violation for Gregory to avoid answering Maryellen's question?

Boundaries: Professional, Personal, Agency

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SITUATION 3

Situation: Stanley worked as a CPSS with Milton for eight months, two years ago. Milton and Stanley meet by chance at Walmart, and they have a friendly conversation about a mutual interest that came up in conversation while Milton was receiving services: antique cars. Milton asks Stanley if he'd like to go with him to an antique car show that will take place in a nearby town in a couple of weeks. Is it ethical for Stanley to go to the car show with Milton?

What CPSS CoE principle(s) is/are involved?

What if Milton is a current client? What if Stanley no longer works at the agency where he met Milton?

Boundaries: Professional, Personal, Agency

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SITUATION 4

SITUATION: Client Kim is meeting with her CPSS Clark and tells him that she'll be starting a new treatment program with a clinician at the same agency. Clark participated in that treatment program in the past and did not feel it was helpful. In fact, he has serious reservations about it and doesn't believe it is appropriate for Kim – or perhaps for anyone. Kim seems excited about this new treatment and asks Clark what he knows about it.

What CPSS CoE principle(s) is/are involved?

Is it an ethical violation for Clark to share his experience with the treatment program? His views on the treatment program?

Boundaries: Professional, Personal, Agency

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**WHY
AM
I
TALKING?**



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SEXUAL/INTIMATE ACTIVITIES

CPSS CoE: (11) The CPSS will never engage in sexual/intimate activities or relationships with the consumers they serve.

NASW CoE: (1.09 Sexual Relationships) Social workers should under no circumstances engage in sexual activities, inappropriate sexual communications through the use of technology or in person, or sexual contact with current clients, whether such contact is consensual or forced.

Sexual/intimate activities between a CPSS and a current client are NEVER OK.

... and

What's an "intimate activity?"

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SITUATION 5

Situation: Elena receives peer support services from CPSS Dawn at the ABC Agency.

CoE: (11) The CPSS will never engage in sexual/intimate activities or relationships with the consumers they serve.

Is it an ethical violation for Dawn to date Elena while she is providing peer support services to Elena?

Is it an ethical violation for Dawn to date Elena if Elena is served by a different CPSS at the ABC Agency? If this is deemed ethical, what rules/precautions might Dawn need to follow with respect to her work/the workplace?

What if Elena is no longer served by the ABC Agency?

Boundaries: Professional, Personal, Agency

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SITUATION 6

Situation: Elena receives peer support services from CPSS Dawn at the ABC Agency. Elena is divorced, and her ex-husband Randy lives in town and shares custody of their children, so Elena and Randy are in regular contact.

CoE: (11) The CPSS will never engage in sexual/intimate activities or relationships with the consumers they serve.

Is it an ethical violation for Dawn to date Elena's ex-husband while Elena is served by the ABC Agency? If this is deemed ethical, what rules/precautions might Dawn need to follow with respect to her work/the workplace?

Is it an ethical violation for Dawn to date Elena's ex-husband if Elena is served by a different CPSS at the ABC Agency? If this is deemed ethical, what rules/precautions might Dawn need to follow with respect to her work/the workplace?

What if Elena is no longer served by the ABC Agency?

Boundaries: Professional, Personal, Agency

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A WORD ABOUT SOCIAL MEDIA

- "Friending" or Following current or past clients online
- Membership in online interest groups

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BE PREPARED

For example: You know you're going to run into clients in the community

How will you respond?

- Will you recognize or ignore them?
- Will you explain your relationship to others? (If so, how?)
- How do you communicate this to clients? How do you determine that your policy is in line with your agency's policy?
- How to prepare your friends and family? – "DON'T ASK, DON'T TELL"

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BE PREPARED

For example: You know clients will leave services

How will you respond?

- Will you permit yourself to interact with clients in a more personal way? [Friend activities, dating, participating in the same mutual support group ...]
- How do you communicate this to clients, both during services and as they leave? How do you determine that your policy is in line with your agency's policy?

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BE PREPARED

For example: ____??____

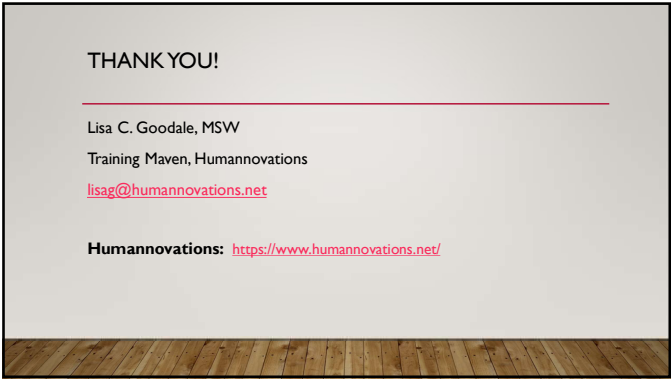
How will you respond?

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PERSONAL AND AGENCY STRATEGIES

- Use of supervision
- Identifying and addressing disconnects between CPSS Ethics and agency policies

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THANK YOU!

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