

# Peer Support Specialist Workbook



Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Date Started: \_\_\_\_\_

# Instructions for Submitting the Peer Support Specialist Workbook

Please note that you **will** need to turn in your workbook after completing the seven online modules to receive credit for this course.

## Options for Completing the Workbook

*There are two options for completing the workbook:*

### Option 1. Complete Digital Workbook

#### **If Using Your Personal Computer**

- Download the Course Workbook and save it to your personal files or desktop. Please save the file as [YourLastName]\_[YourFirstName]\_workbook.pdf (example: Smith\_John\_Workbook.pdf)
- Open the fillable workbook in Adobe Acrobat Reader. You can download the program for free, [here](#), if you do not already have it.
- Fill out the digital workbook in Adobe Acrobat Reader. You will likely be completing the workbook over multiple sessions so it is important to remember to save the document to your flash drive after each work session.
- Once you've completed your workbook, you will have the option to upload it on the final page of the online course, submit it by email, or mail or hand-deliver a physical copy to CASAT.

#### **If Using A Public Computer**

- Download the Course Workbook and save it to a flash/thumb/jump/USB drive. Please save the file as [YourLastName]\_[YourFirstName]\_workbook.pdf (example: Smith\_John\_Workbook.pdf)
- Open the fillable workbook in Adobe Acrobat Reader. You can download the program for free, [here](#), if you do not already have it.
- Fill out the digital workbook in Adobe Acrobat Reader. You will likely be completing the workbook over multiple sessions so it is important to remember to save the document to your flash drive after each work session.
- Once you've completed your workbook, you will have the option to upload it on the final page of the online course, submit it by email, or mail or hand-deliver a physical copy to CASAT.

### Option 2. Complete Workbook By Hand

Download and print the workbook. Complete workbook by hand. Once you've completed your workbook, you will have the option to upload it on the final page of the online course, submit it by email, or mail or hand-deliver a physical copy to CASAT.

## Options for Submitting the Workbook

*There are three options for completing the workbook:*

**Option 1. Upload the Completed Workbook on the Final Page of the Online Course**

**Option 2. Email the completed workbook to [training@casat.org](mailto:training@casat.org).**

**Option 3. Hand-deliver or Mail your completed workbook to the address below (may take longer than 7-10 days to receive your certificate):**

CASAT/University of Nevada, Reno  
ATTN: Peer Support Specialist Online Course  
1664 N. Virginia St., Orvis Building 225  
Mail Stop 279  
Reno, NV 89557

## Workbook Activities for Module 1

### Module 1. Activity 1. Topic: Challenging Internalized Stigma

**Expected Time for Completion: 1 hour**

#### Purpose of the Activity

The purpose of this activity is to help you to understand how you can help to challenge the internalized stigma that can be associated with substance use and mental health conditions. The activity will help you to develop some responses you can use when you encounter internalized stigma in yourself or your client.

#### Assignment Description

Stigma shows up in various ways and it is important for you as a peer specialist to have effective responses ready when you or your client encounter stigma. One of the most painful ways that stigma appears in the recovery process is via internalized stigma – the negative judgments that people with behavioral disorders make about themselves. As a peer specialist it is important for you to be able to recognize and address your own internalized stigma so that you can help your client to do the same.

**Part 1:** Language is one of the most powerful reinforcers of stigma. In the space below make a list of some of the negative terms you have used to describe yourself with regard to your substance abuse or mental health condition:

- 1.
- 2.
- 3.
- 4.
- 5.

When you hear any of those words now, whether they are directed at you or at others, do you think they apply to you? How do you respond when you hear those words?

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**Part 2:** Language can also be a powerful tool to reducing stigma. In the space below, make a list of positive terms you can use to describe yourself as a person in recovery:

1.

2.

3.

4.

5.

When you hear these terms used by others, do you automatically think they apply to you? How do you respond when you hear those words?

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**Part 3:** As a peer specialist, it is likely that you will encounter internalized stigma in your clients. Imagine that your client has said something like, “Once a junkie, always a junkie, I guess. I’ll never amount to anything.” In the space below, write what you might say to help your client counter this internalized stigma.

## **Module 1. Activity 2. Topic: Role of the Peer Specialist**

**Expected Time for Completion: 1.5 hours**

### **Purpose of the Activity**

The purpose of this activity is to help you to understand how the role of the peer specialist may vary depending upon the setting in which it is performed. You will have a chance to compare your current job description with the job description from another setting to view which job tasks are common across the settings and which job tasks may be unique to a particular setting. You can also use this activity to help you find different ways to describe what you do as a peer specialist so that your clients and other people can clearly understand your work.

### **Assignment Description**

Agencies that employ peer specialists may assign them to different roles depending upon the type of services that the agency provides and the setting in which the peer specialists practice. As you continue in your work as a peer specialist, it is important to be able to recognize how your work may differ across various settings. It is also important to understand how different terminology may be used to describe job tasks that are essentially the same. Follow the steps below to complete this assignment.

1. Obtain a copy of your job description from the agency you work in. If you are not currently employed as a peer specialist, go online to get a job description.
2. Identify another agency in your community that employs peer specialists. Contact their Human Resource Department and ask for a copy of their peer specialist job description. If you are unable to do this, find a peer specialist job description from the internet and download it.
3. Use the attached work sheet and copy the list of tasks for each job in the long boxes. Add more numbers if there are more than 10 tasks in either job description.
4. Below the task list, complete the matching exercise.
5. Compare terminology used to describe the tasks that match between agencies. Is it the same or different?

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Module 1. Activity 2. Worksheet <b>Peer Specialist Job Tasks</b>	
<b>My Job Description</b>	<b>Other Agency Job Description</b>
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

**Matching Exercise:** Match your job tasks by number with the job tasks from the other agency. Then, identify tasks that do not have matches between settings.

- My task # 1 matches task # \_\_\_\_ from the other agency
- My task # 2 matches task # \_\_\_\_ from the other agency
- My task # 3 matches task # \_\_\_\_ from the other agency
- My task # 4 matches task # \_\_\_\_ from the other agency
- My task # 5 matches task # \_\_\_\_ from the other agency
- My task # 6 matches task # \_\_\_\_ from the other agency
- My task # 7 matches task # \_\_\_\_ from the other agency
- My task # 8 matches task # \_\_\_\_ from the other agency
- My task # 9 matches task # \_\_\_\_ from the other agency
- My task # 10 matches task # \_\_\_\_ from the other agency

These task numbers in my job description do not have a match from the other agency:



## Terminology Comparison

Look at the tasks that you matched above. Was the terminology used the same or different? For example, did one job description say “teach” and the other “instruct”? For each matched set of tasks, list below terms that are the same or **mean the same thing**. **Add more numbers to the list if you need to.**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

## Workbook Activity for Module 2

### ***Module 2. Activity 1. Topic: Elements of the Recovery Journey***

**Expected Time for Completion: 120 minutes**

#### Purpose of the Activity

The purpose of this activity is to promote understanding that each person in recovery has taken a different pathway and that recovery has distinct components that led to personal satisfaction and achievement of recovery goals. Another purpose is to practice skills related to interviewing and critical thinking.

#### Assignment Description

In the first part of this activity, you are required to interview two persons in recovery using the interview questions provided. You will complete the questions, too. These uncover important aspects of the recovery journey. The second part of the activity involves comparison of the data from the three sets of question responses to determine some common threads of the recovery experiences. You will need to refer the content of Module 2 to determine common threads related recovery capital and the 10 principles of recovery.

1. Review the interview questions. Complete the questions for yourself.
2. Interview two people you know or are working with using the same set of interview questions. Please make sure there is no identifying information about the people who have agreed to participate in the interview. You can use a first name or a made up name for the person in writing the responses to the questions.
3. Complete the questions for the comparison portion of the activity.

You will need to submit the responses to the three interviews (self and two others) and the responses for the comparison activity in order to receive credit in this course.

## Dimensions of Recovery Interview Questions

### Your Responses:

1. What had the greatest influence on your decision to commit to recovery?
2. Who was instrumental in supporting your recovery? Why?
3. What were the main things that supported your recovery (for example: treatment, family, friends, peers in recovery, becoming employed or getting trained, etc.)?
4. Is there anything else that might have been helpful to support your recovery that you didn't have access to?

**First Name of Person Being Interviewed:** \_\_\_\_\_

1. What had the greatest influence on your decision to commit to recovery?
2. Who was instrumental in supporting your recovery? Why?
3. What were the main things that supported your recovery (for example: treatment, family, friends, peers in recovery, becoming employed or getting trained, etc.)?
4. Is there anything else that might have been helpful to support your recovery that you didn't have access to?

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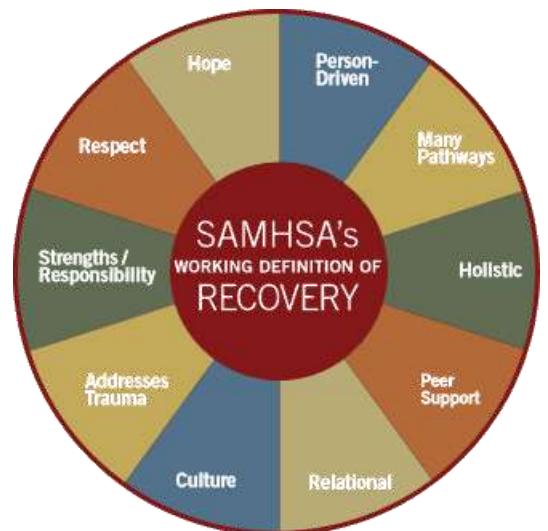
First Name of Person Being Interviewed: \_\_\_\_\_

1. What had the greatest influence on your decision to commit to recovery?
2. Who was instrumental in supporting your recovery? Why?
3. What were the main things that supported your recovery (for example: treatment, family, friends, peers in recovery, becoming employed or getting trained, etc.)?
4. Is there anything else that might have been helpful to support your recovery that you didn't have access to?

## Comparison of Recovery Interview Questions

1. What elements of recovery were common among the two interviewees and your own answers?
2. Were there differences in each person's path to recovery? What are they?

3. Which recovery principles were highlighted as important for all?



## Workbook Activities for Module 3

### Module 3. Activity 1. Topic: Writing Your Recovery Story

**Expected Time for Completion: 1 hour**

#### Purpose of the Activity

The purpose of this activity is to establish a preferred structure for writing a personal recovery story. Another purpose is to foster critical thinking about the way the story is told in a more positive and inspirational focus. Knowing how to write one's personal story will help build the skill set needed to help service recipients to use the same structure and tone.

#### Assignment Description

A recovery story is simply an accounting or recounting of your experiences with a substance use and/or mental health condition. Recovery stories are meant to offer hope and inspiration to others who are experiencing similar issues while at the same time celebrating how far you have come.

Remember from what you learned in Module 3, there two kinds of stories – an illness story and a recovery story. Illness stories tend to be more negative, focusing on graphic images or details, anger, feelings of hopelessness, etc. Since you are preparing to be a peer support specialist, it is anticipated that you have a fuller and more positive perspective on your recovery journey; however, it's always good to capture your story and examine it more closely.

Write your story using the framework provided in the activity sheet. Write it from the perspective that it will serve as a basis for what you use with persons you serve. Leave it alone for a day or two, and then read it over. Is it a recovery or an illness story? If it is an illness story try recounting your experiences again and rewriting your story until you are satisfied with it.

Here are a few important points to remember when writing and finalizing Your Recovery Story:

- Sharing your story does not mean you have to report or detail every experience you have had. Set boundaries on what you disclose with regard to your comfort and what certain details lend to your story.
- Include statements that can offer insight and hope to others struggling to understand what is happening in ways that no other person can.
- Keep in mind that you are talking about you and your experiences – you are not giving directions, medical advice, or conveying that your path to recovery should be adopted by others.

## Your Recovery Story

1. What were some of the early indications that you were beginning to have difficulties?
2. Describe yourself and your situation when you were at your worst.
3. What helped you move from where you were to where you are now?
4. How did you accomplish this? What did you do? What did others do to help you?
5. What have you had to overcome to get where you are today?
6. What have you learned about yourself and your recovery?
7. What are some of the strengths you have developed and used?
8. What types of supports have you developed and used?
9. What are some of the things you do to remain on your path to wellness and recovery?

## **Module 3. Activity 2. Topic: Practice of MI Skills - Readiness Rulers**

**Expected Time for Completion: 1.5 hours**

### **Purpose of the Activity**

The purpose of this activity is to introduce the learner to a key technique used as a part of Motivational Interviewing. This gives the learner direct practice in using Scaling Rulers to assess a volunteer participant's readiness for change.

### **Assignment Description**

In this activity you will work with a volunteer participant to practice the use of scaling rulers to increase the perceived importance of making a change, and explore the person's confidence that a change is possible for him/her. This scaling strategy conceptualizes readiness or motivation to change along a continuum using a 10-point scale where 1 = definitely not ready to change and 10 = definitely ready to change.

The activity sheet for **Importance and Confidence Scaling Rulers** gives step-by-step instructions for doing this. You are required to submit a summary of the volunteer's responses for credit in this activity using the **Record the Responses for Importance and Confidence Scaling Rulers** form.

## Importance and Confidence Scaling Rulers

- 1. Selection of Activity Participant.** Ask a friend, peer, family member or person you are serving if they will participate with you in this practice session. Ask them to select something they would like to change in their behavior or habits (for example, diet, exercise, stopping smoking, etc.).

- 2. Introduce the Discussion.** Begin the conversation with these two questions.

"I'm not really sure exactly how you feel about \_\_\_\_\_. Can you help me by answering two simple questions, and then we can see where to go from there?"

- 3. Assessing Importance and Confidence.** Using the scaling ruler form (provided here), start with the Importance Ruler. Show the volunteer the Importance Scaling Ruler and ask..

"How do you feel *right now* about \_\_\_\_\_?"

On a scale of 1 to 10, with 1 being low and 10 being high, how **important** is it to you to \_\_\_\_\_? If 0 was 'not important at all' and 10 'very important', what number would you give yourself?"

Show the volunteer the Confidence Ruler and ask... "If you decided *right now* to \_\_\_\_\_, how *confident* do you feel that you would succeed? If 0 was 'not at all confident' and 10 was 'very confident', what number would you give yourself?"

Record the person's numeric ratings and verbally summarize the answers for the person to ensure you understood correctly.

- 4. Exploring Importance.** Explore the person's rating using the following types of questions, reflections and summarizations.

"This is [very/pretty/somewhat/a little bit] important to you. What made you choose \_\_\_\_\_ and not (score minus 3 or 4)?"

- Reflect reasons given (change talk)
- Ask for elaboration ("What makes that important to you?" / "Tell me more about that.")
- Summarize ("So what makes this [very/pretty/somewhat/a little] important right now is . . .")

If the person's rating is lower than a 7, ask "What would have to happen for you to move up to a [score plus 3-4]?"

"What stops you from being at a [score plus 3-4]?"

- Reflect, ask for elaboration, ask 'what else'



### Overall Summary

- “So what makes this [very/pretty/somewhat/a little] important is . . .”
- “It would become more important to you if . . .”
- “What has kept it from being more important is . . .”

### 5. **Exploring Confidence.** Follow the same series of questions as above.

“You feel [very/pretty/somewhat/a little bit] confident that you could do this if you tried  
What made you choose \_\_\_\_\_ and not (score minus 3 or 4)?”

- Reflect reasons given (change talk)
- Ask for elaboration (“What else makes you feel [very/pretty/somewhat/a little] confident? “Tell me more about that.”)
- Summarize (“So what makes you [very/pretty/somewhat/a little] confident right now is . . .”)

If the person’s rating is lower than a 7, ask “What would have to happen for you to move up to a [score plus 3-4]?”

“What stops you from being at a [score plus 3-4]?”

- Reflect, ask for elaboration, ask ‘what else’

### Overall Summary

- “So what makes you [very/pretty/somewhat/a little] confident is . . .”
- “You would feel more confident if . . .”
- “What has kept you from feeling more confident is . . .”

### 6. Ask the volunteer how they felt about engaging in this type of conversation about change.

## Record the Responses for Importance and Confidence Scaling Rulers

### 1. The type of change my volunteer selected was...

### 2. Importance Ruler Ratings and Summary of Conversation.

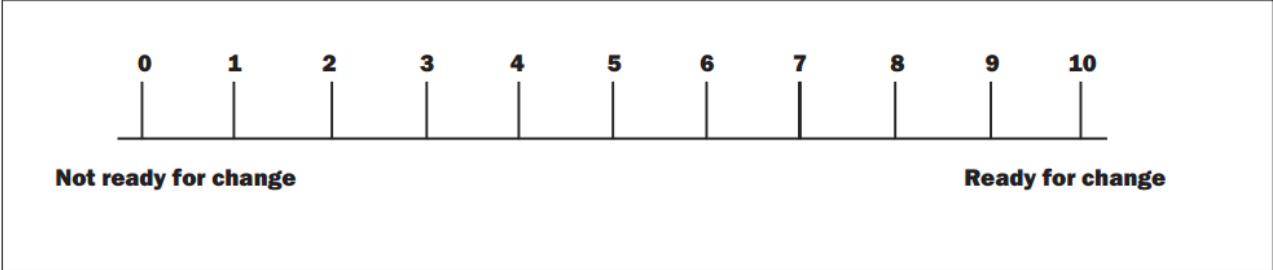
- Rating for Importance Ruler: \_\_\_\_\_
- What made the person select that rating?
- If their number was less than a 7, what would it take for him or her to have a higher rating?
- How did you summarize this part of the conversation?
  - So what makes this [very/pretty/somewhat/a little] important is . . .
  - It would become more important to you if . . .
  - “What has kept it from being more important is . . .

### 3. Confidence Ruler Ratings and Summary of Conversation.

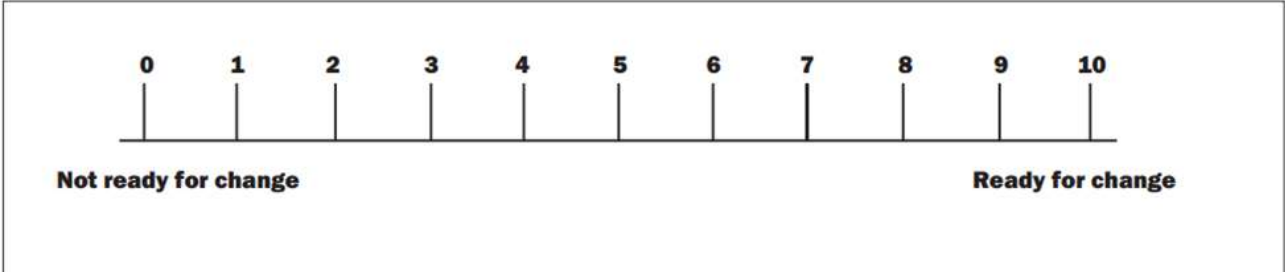
- Rating for Confidence Ruler: \_\_\_\_\_
- What made the person select that rating?

- If their number was less than a 7, what would it take for him or her to have a higher rating?
  
  - **How did you summarize this part of the conversation?**
    - So what makes you [very/pretty/somewhat/a little] confident is . . .
  
    - You would feel more confident if . . .
  
    - “What has kept you from feeling more confident is . . .
- 4. How did the volunteer feel about engaging in this type of conversation about change?**
- 5. Based on this brief activity, how ready do you believe your volunteer is to make a change in a positive direction?**

### Importance Ruler



### Confidence Ruler



## Workbook Activities for Module 4

### **Module 4. Activity 1. Topic: Personal Wellness Planning, Part 1**

**Expected Time for Completion: 1 hour**

#### Purpose of the Activity

The purpose of this activity is to practice personal wellness assessment and planning. You will practice skills in the areas of brief assessment to begin the process of planning for self-care. This activity can be used in your work to assist the persons you serve assess and plan for their own areas of well-being.

#### Assignment Description

**There are many types of wellness assessment instruments in paper form and on the Internet. In this activity, you will take the free, online *Stress & Well-Being Survey*™ offered by the Institute of HeartMath. This scientifically developed assessment tool guides you in determining the state of well-being in relationship to home, work, relationships, and finances. It measures your stress-management, adaptability, resilience, and emotional health levels. Your data is secure and anonymous in the HeartMath database.**

Immediately after you submit your survey responses, it analyzes the data in relation to HeartMath's 5 Aspects of Well-Being and gives instant results. The results can be, and need to be printed for submission as a part of this Workbook activity. The survey results will suggest practical and easy steps for achieving your best "Zone of Performance." Most of the resources suggested are ones that HeartMath offers (many for free), but don't be limited by this. Many other strategies and resources exist for improving well-being.

#### **INSTRUCTIONS:**

1. Go to the *Stress & Well-Being Survey*™ at <http://www.heartmath.org/free-services/self-assessment-tools/stress-and-well-being-survey.html>. Click on the **GET STARTED NOW! Stress & Well-Being Survey** on your computer screen.
2. You will arrive at a page that says "Log-in to the IHM" site. In order to take the survey, you have to register with the Institute of HeartMath. This is very simple; only your name, an email address and a password is required for registration. Click on the "Register here" link and follow the prompts on the screen to register. You are now ready to take the survey!



3. Return to the survey page as shown above and log in. Before taking the survey, watch the **Introduction** video by clicking on the video icon (shown here as an example). This explains the survey and the types of results it produces.
4. Take the survey, answering all items. Before pressing the “Submit Survey” button, you may want to print out this part of the survey to have a record of your responses to each survey item. No “Print” button is available here. You will have to go to the File/Print command in your Internet browser to print. This is not required, only suggested for your records. Submit your survey.
5. Submitting the survey will bring up a page requesting additional demographic information. This is optional – you don’t need to fill in any of this data to see your results. If desired, fill in the optional information you wish and select the “See your Results” button at the bottom of the page.
6. The Results page is a colorful visual "report card" that will show how you’re performing in each of the 12 aspects of wellness measured in the survey, as well as give you an overall score of Total Stress and Total Well-Being. Your score may range from 0 to 100 and will be indicated by the dark line and ball marker in each individual bar graph. The survey system determines your score by comparing your responses to the responses of all persons who have taken the survey.

Review your results. Print your results using the printer icon shown on the screen.

You will see recommendation links that provide you with a set of personal recommendations (based on your scores) with links to tools and empowerment materials to help you improve your well-being and transform your stress to higher levels of energy and creativity.

## **Module 4. Activity 2. Topic: Personal Wellness Planning, Part 2**

**Expected Time for Completion: 0.5 hour**

### **Purpose of the Activity**

Peer support specialists assist peers in setting recovery/wellness goals, developing recovery action plans, and solving problems directly related to recovery. It's often frustrating to write meaningful goals; however, without goals there is no sense of progress or forward direction.

The purpose of this activity is to use your results from the HeartMath *Stress & Well-Being Survey*™ to craft at least one goal related to improved wellness. The format for this activity can serve as a foundation for writing all goals, thereby ensuring that they are clearly stated, achievable, measureable, and a time limit.

### **Assignment Description**

1. In preparation for this activity you need to have the results print-out from the *Stress & Well-Being Survey*.™ Which areas were rated the highest for levels of stress?

Identify the three (3) most significant stressors:

**Stressor 1:** \_\_\_\_\_

**Stressor 2:** \_\_\_\_\_

**Stressor 3:** \_\_\_\_\_

Select one of the Stressor areas to use in writing a goal or goals.

2. Watch the 4-minute YouTube video – *SMART Goals – Quick Overview* at <https://www.youtube.com/watch?v=1-SvuFIQjK8>
3. Practice writing an effective goal statement by using the template – SMART Goals – provided. Make notes in the SMART sections and write a goal. Feel free to copy the template and write more than one goal. At least one template worksheet must be submitted for course credit.

Here are some simple rules for writing goal statements:

1. Use clear, specific language. For example, "To find a job" is too general; "To find and apply to five job openings before the end of the month" is better. Sometimes a more general goal can become the long-term aim, and you can identify some more specific goals to take you there.

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2. Start your goal statement with TO + a VERB
3. Write your goal statement using SMART Goal Criteria
4. Avoid using negative language. Think positive!

*Note: Space to write your goals is included on the following pages.*



## Module 4: SMART GOALS

<b>Name</b>	
<b>Long-term Aim</b>	
<b>Date</b>	
<b>Reason this goal is important to me</b>	

Step	Mnemonic	Description
1	<p><b><u>S</u>pecific</b> Exactly what is it you want to achieve? Good goal statements explain: what, why, who, where and when. If your goal statement is vague, you will find it hard to achieve because it will be hard to define success.</p>	
2	<p><b><u>M</u>easurable</b> You must be able to track progress and measure the result of your goal. Good goal statements answer the question: how much or how many. How will I know when I achieve my goal?</p>	
3	<p><b><u>A</u>chievable or <u>A</u>ctionable</b> Goals should be achievable. Can they be put into action? You must possess the appropriate knowledge, skills, and resources needed to achieve the goal.</p>	
4	<p><b><u>R</u>esults-focused</b> Goals should measure outcomes, not activities. Do you know what you want as the end result?</p>	
5	<p><b><u>T</u>ime-Bound</b> Goals must have a deadline. A good goal statement will answer the question: When will I achieve my goal? Without deadlines, it's easy to put goals off. Goals should be linked to a timeframe that creates a practical sense of urgency to achieve the goal.</p>	

**Goal Statement:**

## Workbook Activities for Module 5

### Module 5. Activity 1. Topic: Mentoring

**Expected Time for Completion: 0.5 hours**

#### Purpose of the Activity

The purpose of this activity is to give you practice in developing a mentoring plan focused on helping a client to master a specific skill. The activity will help you to identify the specific steps to independent skill mastery and to incorporate an understanding of learning styles and adult learning principles.

#### Assignment Description

For this activity, imagine that you have been assigned to a peer mentoring relationship with someone who has never lived independently. Your client has a job and is housed in a low-income housing unit where rent is based on income and the monthly fee includes utilities. The client will now be responsible for paying his own bills. When the client talks about understanding something, he often says, "I see what you mean," or "I can picture that."

In the space below, create a four step mentoring activities plan that will take the client from his total lack of experience to mastering the task of creating a budget.

#### **Step 1**

Your role or activity: \_\_\_\_\_

Client's role or activity: \_\_\_\_\_

Learning Strategies: \_\_\_\_\_

\_\_\_\_\_

#### **Step 2**

Your role or activity: \_\_\_\_\_

Client's role or activity: \_\_\_\_\_

Learning Strategies: \_\_\_\_\_

\_\_\_\_\_

**Step 3**

Your role or activity: \_\_\_\_\_

Client's role or activity: \_\_\_\_\_

Learning Strategies: \_\_\_\_\_

\_\_\_\_\_

**Step 4**

Your role or activity: \_\_\_\_\_

Client's role or activity: \_\_\_\_\_

Learning Strategies: \_\_\_\_\_

\_\_\_\_\_

## **Module 5. Activity 2. Topic: Group Observation**

**Expected Time for Completion: 1.5 hours**

### **Purpose of the Activity**

The purpose of this activity is to help you to understand how groups that are facilitated by peer support specialists work and to help you recognize how the various roles and functions of the facilitator are performed in order to help participants to reach their goals.

### **Assignment Description**

**In this assignment, you will observe a group session facilitated by another peer support specialist. Choose a group conducted at your own agency, or watch this video: (<https://www.youtube.com/watch?v=65BhPDyn0qQ>) to observe the group session.**

**After the group, complete the activity below to show that you recognize the principles and processes of group facilitation when you see them in action. Provide at least one example for every question.**

For this exercise, I  Watched the video  Observed a group at my agency

Type of Group:  Support Group  Education Group

If Support Group, which type?

- Curriculum-Based
- Topic-Focused
- Open-Forum

**What things did the facilitator say to set the tone for the group?**

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

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**What things did the facilitator say or do to move the group process forward?**

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

**What things did the facilitator say or do to ensure the comfort and cohesion of the group?**

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

**If the group you observed was an Education Group, provide examples of how the facilitator did at least two of the following tasks:**

- conveying required information
- modeling skills to be acquired
- providing opportunities for skill practice and feedback
- confirming client progress or mastery

**Task:** \_\_\_\_\_

**Demonstrated by:** \_\_\_\_\_  
\_\_\_\_\_

**Task:** \_\_\_\_\_

**Demonstrated by:** \_\_\_\_\_  
\_\_\_\_\_

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Choose one problem that arose in the group from this list and tell how the facilitator dealt with the problem.

- Dependence on the Facilitator
- Disruption of the group process
- Challenging the group leader
- General lack of participation
- Domination of Discussion
- Arguing or conflict among group members

Problem: \_\_\_\_\_

Facilitator Response: \_\_\_\_\_

---

## **Module 5. Activity 3. Topic: Facilitation Plan B<sup>1</sup>**

**Expected Time for Completion: 0.5 hour**

### **Purpose of the Activity**

The purpose of this activity is to help you to become aware of your own responses as a facilitator when encountering specific situations in a group session. The exercise encourages you to think of other effective ways that you could respond to those situations. When you have a “Plan B” for possible difficulties within the group, you will be able to adapt quickly if one solution does not work. This will make you a more flexible facilitator and, in turn, will help you to meet your clients’ needs more effectively.

### **Assignment Description**

If you have facilitated groups, you have already developed some techniques that you use on a routine basis to move the process along smoothly or to handle problems as they arise. If you have not facilitated groups, you have probably participated in a number of either support or education group sessions. As a facilitator, it is important that you are aware and intentional about the ways in which you respond to group dynamics.

For each of the situations listed below, put your usual or typical response in blank “a.” If you have not facilitated a group before, fill in that blank with the facilitator response that you saw most frequently when you were a participant in a group. Then think of possible alternative ways of handling each of these situations and list those alternatives in blanks “b” and “c”.

#### **1. When someone is angry in a group, I usually**

**(a)** .....

**As an alternative, I could try**

**(b)** .....

**Another alternative is**

**(c)** .....

---

<sup>1</sup> *This activity is adapted, with permission from:*

Prendiville, P. (2008). *Developing facilitation skills: A handbook for group facilitators*. Dublin, Ireland:

Combat Poverty Agency. Retrieved from:

[www.combatpoverty.ie/publications/DevelopingFacilitationSkills\\_2008.pdf](http://www.combatpoverty.ie/publications/DevelopingFacilitationSkills_2008.pdf)



2. If one person dominates the discussion, I usually

(a).....

As an alternative, I could try

(b) .....

Another alternative is

(c) .....

3. When there is disagreement or conflict in the group, I usually

(a) .....

As an alternative, I could try

(b) .....

Another alternative is

(c) .....

4. If someone challenges my leadership, I usually

(a) .....

As an alternative, I could try

(b) .....

Another alternative is

(c) .....

5. If people are not participating in the group, I usually (a)

.....

As an alternative, I could try

(b) .....

Another alternative is

(c) .....

6. When someone brings up inappropriate material, I usually

(a) .....

As an alternative, I could try

(b) .....

Another alternative is

(c) .....

**7. If ground rules are broken, I usually**

(a) .....

**As an alternative, I could try**

(b) .....

**Another alternative is**

(c) .....

**8. When someone breaks the confidentiality of the group, I usually**

(a) .....

**As an alternative, I could try**

(b) .....

**Another alternative is**

(c) .....

**9. To set the tone for the group session, I usually**

(a) .....

**As an alternative, I could try**

(b) .....

**Another alternative is**

(c) .....

**10. If someone has an emotional "trigger" or crisis in the session, I usually**

(a) .....

**As an alternative, I could try**

(b) .....

**Another alternative is**

(c) .....

## Workbook Activities for Module 6

### ***Module 6. Activity 1. Topic: Creating Your Elevator Pitch***

**Expected Time for Completion: 1 hour**

#### Purpose of the Activity

As you learned in the course, you may or may not have a direct role in system advocacy. There are times, however, that you may find yourself in a situation where you unexpectedly come in contact with a policymaker, their staff member, or another person who is in a position of influence. In cases like this, you have a brief opportunity (less than a minute) to make an impact. To make the most of this moment, it is critical that you have prepared a pitch in advance.

The purpose of this activity is to prepare you for those moments. You will develop and practice an elevator pitch (speech) on an advocacy topic that is important to you. Remember to: 1) open strong; 2) discuss the issue concisely; 3) offer the solution; and, 4) ask for action.

#### Assignment Description

Use the template on the following page to create your elevator pitch. You might want to rework it a couple of times.

Practice your pitch! First, practice it by looking in the mirror. Practice so that the delivery is natural, conversational, and effortless. Time yourself so you have a pitch that needs only 30 – 60 seconds to deliver.

Now, the final part. Deliver your elevator pitch to a willing volunteer. Look the person in the eyes. Ask him or her to give you feedback on your message and how you delivered it. Ask if you showed confidence and let your passion for the topic show through appropriately.

Submit your completed elevator pitch. *Note: Space is provided on the next page.*

## Identify Yourself and Establish Your Purpose



## Discuss the Issue



## Communicate Your Proposed Solution



## Engage with a Question and Ask for What You Want



## Practice

1. Say your elevator pitch out loud and time yourself. Make sure you don't go over 60 seconds.
2. Please enter your volunteer's name below, and date.

**Name**

**Date**

## **Module 6. Activity 2. Topic: Researching Advocacy Organizations**

**Expected Time for Completion: 1 hour**

### **Purpose of the Activity**

The purpose of this activity is to learn about some of the organizations that have an advocacy mission for the needs of persons with substance use and mental health conditions.

### **Assignment Description**

Your assignment is to conduct an Internet search and find two national advocacy organizations – *one devoted to substance use conditions and one devoted to mental health conditions* – and one state-level advocacy organization of your choosing.

Complete the following data for each organization.

1. Name of the organization and its web address
2. Mission of the organization/who they advocate for
3. Current advocacy initiatives (for example, public policy, organizing constituents, etc.)
4. Ways to get involved in the organization/advocacy efforts (if indicated on website)

1. Name of the organization and its web address
2. Mission of the organization/who they advocate for
3. Current advocacy initiatives (for example, public policy, organizing constituents, etc.)
4. Ways to get involved in the organization/advocacy efforts (if indicated on website)

1. Name of the organization and its web address
2. Mission of the organization/who they advocate for
3. Current advocacy initiatives (for example, public policy, organizing constituents, etc.)
4. Ways to get involved in the organization/advocacy efforts (if indicated on website)

## Workbook Activities for Module 7

### Module 7. Activity 1. Topic: Confidentiality

**Expected Time for Completion: 0.5 hour**

#### Purpose of the Activity

Confidentiality is one of the most important rights of every client who receives behavioral health services. The purpose of this activity is to check your understanding of the requirements for protecting patient confidentiality and how to handle sharing of client-related information.

#### Assignment Description

In this assignment, you are asked to determine whether to share the client information that is being requested. For each scenario below, check the appropriate box.

1. There is a court order requesting the information. No consent is on file.

Share Information

Do Not Share Information

2. The client's counselor from a past agency requests the information. The counselor has documentation that the client was served by the agency.

Share Information

Do Not Share Information

3. The client's partner has requested information about the client. There is a written consent in place.

Share Information

Do Not Share Information

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4. The client is returning to treatment after a relapse. The client needs dental services. A general written consent from the prior treatment episode is in place.

Share Information       Do Not Share Information

5. The client has threatened to harm a family member and is likely to do so. No consent to share information with that family member is in place.

Share Information       Do Not Share Information

6. Another peer support specialist who participates in your supervision group, but does not work for your agency, asks about the client, saying that they attend AA together.

Share Information       Do Not Share Information



**Module 7. Activity 2. Topic: Boundaries****Expected Time for Completion: 1 hour****Purpose of the Activity**

The purpose of this activity is to check your understanding of appropriate boundaries in the peer support relationship and to give you practice in discerning when boundary crossings may be helpful to a client and when they are harmful.

**Assignment Description**

In this assignment, you will look at a list of activities or behaviors that might happen in a peer support relationship. For each item, you will be asked to decide whether the behavior is “always okay,” “sometimes okay, sometimes not,” or “never okay.” For each behavior that you mark as “sometimes okay, sometimes not, you will be asked to provide a brief statement about how you would decide whether to do that thing or not.

<b>Behavior of Peer Support Specialist</b>	<b>Always Okay</b>	<b>Sometimes okay; Sometimes not okay</b>	<b>Never Okay</b>
Giving a gift to the client			
Accepting a gift from the client			
Lending money			
Borrowing or accepting money			
Giving a hug			
Saying, “You’re a very special person”			
Saying, “You’re a very special person to me.”			
Accepting an invitation to holiday dinner at client’s home			

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<b>Behavior of Peer Support Specialist</b>	<b>Always Okay</b>	<b>Sometimes okay; Sometimes not okay</b>	<b>Never Okay</b>
Disclosing that you are a person in recovery			
Having a sexual relationship with the client			
Sexual relationship with a client's family member			
Giving client your cell phone number			
Using profanity			
Sharing information about your client with written permission			
Using drug culture slang			
Saying, "I'm going through a rough divorce myself right now."			
Saying, "You're very attractive."			
Addressing client by first name			
Attending a recovery support meeting together			
Hiring client to do work at your home.			
<p>Adapted from: White, W.L. (n.d.) <i>Ethical guidelines for the delivery of peer-based recovery support services</i>. Retrieved from:  <a href="file:///C:/Users/owner/Desktop/EthicsPaperFinal6-8-07.pdf">file:///C:/Users/owner/Desktop/EthicsPaperFinal6-8-07.pdf</a></p>			

## Peer Support Specialist Workbook

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For each behavior that you placed in the “Sometimes” column, provide a sentence below that explains when you think it might be okay and when not. Include additional lines if necessary.

1. \_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_

6. \_\_\_\_\_  
\_\_\_\_\_

7. \_\_\_\_\_  
\_\_\_\_\_