PEER POSITIVE TOOLBOOK

PREPARING ORGANIZATIONS TO BETTER ENGAGE PEOPLE WITH LIVED EXPERIENCE THROUGH EQUITABLE PROCESSES

CONTENTS

THIS TOOLBOOK

WHAT DO WE MEAN BY "PEER POSITIVE TOOLBOOK"?

Peer Positive aims to prepare organizations for change by encouraging equitable processes of engagement that value lived experience. This toolbook is a preparatory guide for anyone who wishes to shift organizational culture, values, and practices to better meet the needs of the people they serve. The toolbook has a focus on balancing power and valuing experiential knowledge.

THAT SOUNDS GREAT! BUT, HOW DOES IT WORK?

1. Read about each core component.
2. Reflect about the state of your organization.
3. Think about where you want your organization to go and what you need to get there.
4. Carefully consider your resources and decide how the core components could fit your context.
5. Now that you know which standards you aim to achieve, take a look at the tools connected to each core component. These are meant to support you in your process.
6. Consider your desired outcomes, and develop an evaluation plan to track your progress.
7. Design your Peer Positive path.
8. Put your plan into practice!
9. As you evaluate your progress, think about how the plan needs to be modified as you continue working towards becoming a Peer Positive organization.

WHERE DID THIS COME FROM?

Peer Positive was created by the Northwest Toronto Service Collaborative, a community-led process sponsored by the Provincial System Support Program at the Centre for Addiction and Mental Health.

Peer Positive, along with this toolbook, has gone through many iterations as we learned from the peers and service providers connected to the initiative. We would like to acknowledge their ongoing commitment and contributions to Peer Positive. We hope this living document and the organizations that are touched by it continue to evolve as we reimagine a new system that better integrates lived experience.

A Preparatory Guide for Organizations

PEER POSITIVE CORE COMPONENTS

WHAT IS A CORE COMPONENT?

Core components are the essential ingredients to achieving the desired outcomes of an intervention or program.

The Peer Positive Core Components are:

- Peer Involvement
- Spaces to Reflect on Power and Equity
- Accountable Mechanisms of Feedback and Response

WHAT DO WE MEAN WHEN WE SAY 'PEER'?

When we say 'peers,' we mean people who have lived difficulties associated with issues such as mental health, addictions, (mis)use of substances, HIV/AIDS, violence against women, and chronic illness, and who demand valuing this experience as a form of expertise that can help improve services.
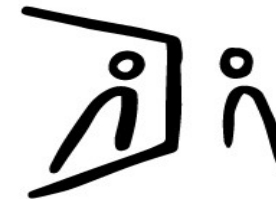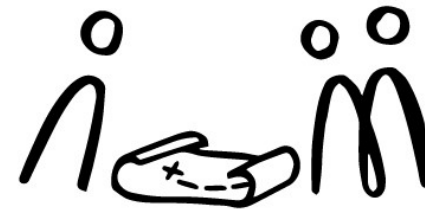
PEER INVOLVEMENT

Within the mental health system, peers are historically disempowered and defined by labels associated with their mental health status. They experience paternalistic and sometimes harmful treatments, and by a system that often fails to provide social inclusion.

It is widely documented that meaningfully involving people with lived experience in the planning, delivery, and evaluation of mental health services is crucial to creating more responsive and empowering service experiences.

Creating meaningful opportunities for peers to contribute to a range of decision-making processes helps services better respond to service user needs. Peer experience is expertise; peers have a unique firsthand perspective about what works well and what needs improvement.

RELATED TOOLS

Ladder of Engagement   (pg. 9)

OUTCOMES

- Peers are involved in decision-making processes related to the design, delivery, and review of a program or service.
- Peers feel confident and prepared for involvement in decision-making processes related to the design, delivery, and review of services.
- Organizational services are more appropriate for the population(s) being served.
- The culture of the organization values and prioritizes meaningful engagement of peer involvement in decisions pertaining to the design, delivery and review of services.

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Staff and peers are **regularly** trained in the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.	Staff and peers are **sometimes** trained in the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.	Staff and peers are **not trained** in the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.
Staff and peers receive **regular** coaching support around the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.	Staff and peers receive **occasional** or one-off coaching support around the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.	Staff and peers **do not** receive any coaching support around the principles and practices of genuine, thoughtful, and fair peer involvement in decision-making.
Opportunities for peers and staff to make genuine, thoughtful and fair contributions to decision-making are **strategically identified and documented.**	Opportunities for peers and staff to make genuine, thoughtful and fair contributions to decision-making are **informally identified and sometimes documented.**	Opportunities for peers to make genuine, thoughtful and fair contributions to decision-making are **not identified or documented.**

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Peers are able to contribute to decision-making processes **at all levels** of the organization.	Peers are able to contribute to decision-making processes at **some levels** of the organization.	Peers are **not able** to contribute to decision-making processes.
Peers are compensated for their involvement **in line with professional compensation** for similar work.	Peers are compensated for their involvement, but **not in line with professional compensation** for similar work.	Peers are **not compensated** for their involvement.
Opportunities for peers to contribute to decision-making processes are **clearly explained, clearly communicated, and readily available.**	Opportunities for peers to contribute to decision-making processes are made available and **explained in an informal way.**	Peers are invited to contribute to decision-making processes **without clear roles.**

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Peers, staff and agency leaders **regularly** develop and pursue opportunities for advocacy on peer involvement externally and internally.	Peers, staff and agency leaders **occasionally** develop and pursue opportunities for advocacy on peer involvement externally and internally.	Peers, staff and agency leaders **do not** develop or pursue opportunities for advocacy on peer involvement externally and internally.
Peers are provided with **regular** support and capacity building opportunities to promote genuine, thoughtful, and fair contributions to decision-making processes.	Peers are provided with informal **or occasional** support and capacity building opportunities to promote their ability to contribute to decision-making processes.	Peers are **not provided** with capacity building opportunities.
Strategic engagement of the populations being served takes place with **regular and formal outreach initiatives.**	Engagement of the populations being served takes place with **informal or occasional outreach initiatives.**	Engagement **initiatives are limited** to segments of the populations being served.

GOLD STANDARD

Engagement initiatives are **deliberately designed** to reach out to equity-seeking groups served by the organization.

ACCEPTABLE VARIATION

Engagement initiatives take equity-seeking groups served by the organization **into consideration**.

UNACCEPTABLE VARIATION

Engagement initiatives **do not** take equity-seeking groups served by the organization into consideration.
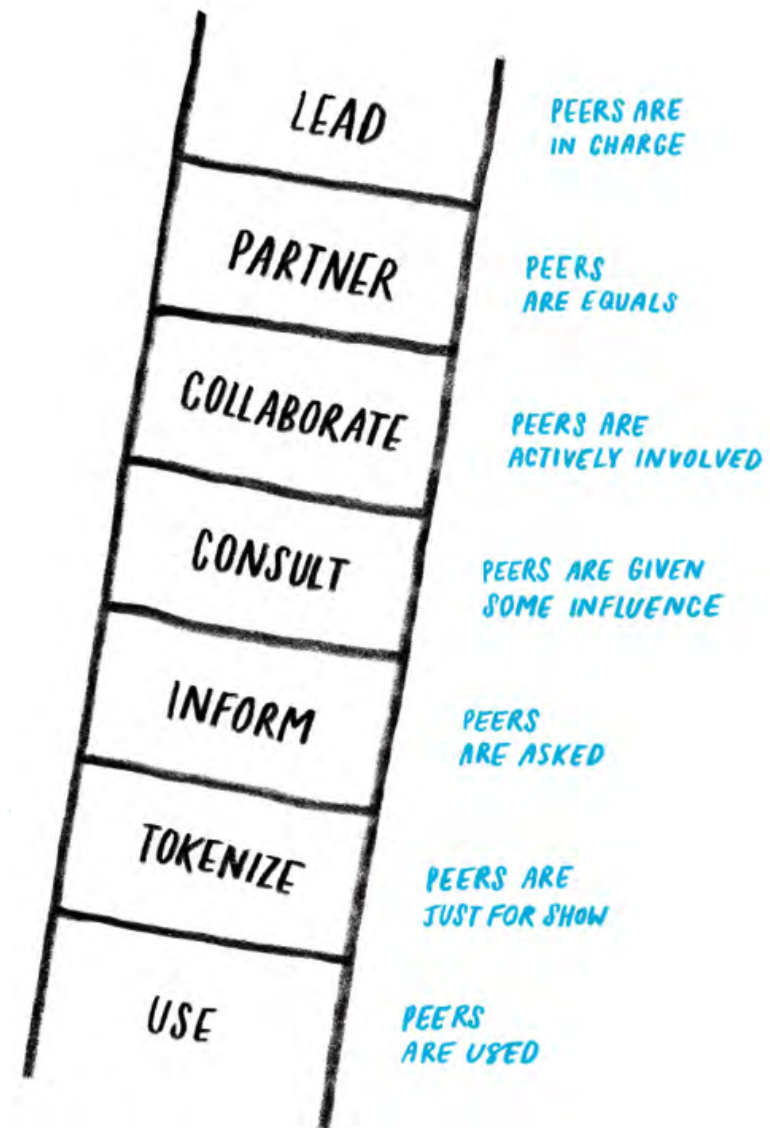
LADDER OF ENGAGEMENT

WHY USE THIS?

- To determine how engaged peers feel during a particular activity.
- To determine how professionals feel that they are engaging peers.
- To compare and contrast professional and peer perceptions of peer engagement.
- To inspire discussion and action on improving the conditions of peer engagement.
- To evaluate the quality of peer engagement over time.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

- Allows organizations to measure peer engagement in a variety of circumstances.
- Allows for reflection, discussion and action that are grounded in the perceptions and experiences of peers and professionals.
- Allows organizations to adapt their working processes to be more responsive to the needs of peers.

WHEN CAN IT BE USED?

- For peers to reflect on how engaged they feel.

LEAD — PEERS ARE IN CHARGE

PARTNER — PEERS ARE EQUALS

COLLABORATE — PEERS ARE ACTIVELY INVOLVED

CONSULT — PEERS ARE GIVEN SOME INFLUENCE

INFORM — PEERS ARE ASKED

TOKENIZE — PEERS ARE JUST FOR SHOW

USE — PEERS ARE USED

- For professionals to reflect on how they *think* peers feel about how they are being engaged. This tool should not be used by professionals in isolation or to assume that they know how peers feel. It is meant to uncover similarities and differences in perceptions.
- For peers and professionals to reflect jointly on peer involvement.
- To reflect on:
  - Peer engagement before, during or after any experience working alongside professionals;
  - Overall feelings of peer engagement related to a service, program or process.
- To elicit anonymous or public perceptions.

WHAT DO YOU NEED TO USE THIS?

A safe environment for peers to be able to provide honest feedback (whether anonymously or publicly).

INSTRUCTIONS FOR PUBLIC USE:

1. Draw or print a large version of the Ladder of Engagement.
2. Ask each participant to reflect on the levels of peer engagement related to the co-design, co-delivery or co-review of a program, service or the whole organization.
3. Ask each participant to indicate the level of engagement either with a marker or a sticker.
4. Use the results to facilitate a discussion about the levels of engagement reflected by the participants. The discussion can look at the current state of engagement and whether it aligns with ideal levels of engagement.
5. Connect these reflections to actions that can achieve improved levels of engagement.
6. If you are doing this exercise with both staff and peers, explore any differences and similarities of perceptions between these two groups.

INSTRUCTIONS FOR ANONYMOUS USE:

1. Give each participant a handout of the Ladder of Engagement.
2. Ask each participant to reflect on the levels of peer engagement related to the co-design, co-delivery or co-review of a program, service or the whole organization.
3. Ask each participant to indicate the level of engagement by marking the appropriate step on the Ladder.
4. Provide an anonymous way of submitting the completed handout.
5. Use the results to facilitate a discussion about the levels of engagement reflected by the participants. The discussion can look at the current state of engagement and whether it aligns with ideal levels of engagement.
6. Connect these reflections to actions that can achieve improved levels of engagement.
7. If you are doing this exercise with both staff and peers, explore any differences and similarities of perceptions between these two groups.

SPACES TO REFLECT ON POWER AND EQUITY

For peers to be meaningfully involved in decision-making processes regarding the design, delivery and review of services, organizations must establish supportive structures to promote an environment capable of addressing issues of power and equity.

Designating time and space for reflection on power and equity can help to embed a greater awareness of how these issues impact peer involvement in decision-making into the culture of the organization.

RELATED TOOLS

CRP Workbook   (pg. 15)
4A Cards   (pg. 16)
Equity Reminder   (pg. 17)
Power Wheel   (pg. 19)
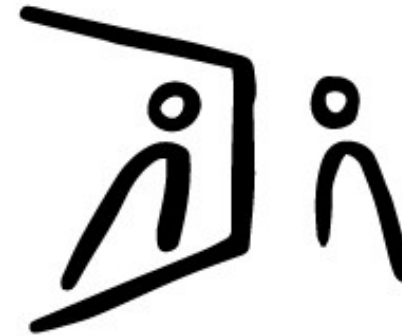
OUTCOMES

- Staff and leadership encourage and promote discussions about issues of power and equity.
- Decision-making processes regarding the design, delivery, and review of services are informed by reflective practice and structured to promote an equitable environment for peer involvement.
- Staff use awareness of power and equity to structure their practice.
- Policies and procedures prioritize equitable practices.

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Ongoing personal and group reflection and discussion of issues of power and equity are **an agency requirement** for all staff and leadership.	Ongoing personal and group reflection and discussion of issues of power and equity **are encouraged** for staff and leadership.	Staff and leadership **do not engage** in personal and group reflection and discussion of issues of power and equity.
Staff and leadership **are required** to address issues of equity and power identified through reflective practice.	Staff and leadership are **encouraged** to address issues of equity and power identified through reflective practice.	Staff and leadership **do not address** issues of equity and power identified through reflective practice.
Staff and leadership have **ongoing** access to dedicated supportive resources (i.e. consultants, coaching) to address issues of equity and power.	Staff and leadership have **occasional** access to supportive resources for addressing issues of equity and power.	Staff and leadership **do not** have access to supportive resources for addressing issues of power and equity.

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Peers have **dedicated time** and space to meet without staff to reflect on issues of power and equity.	Peers have **informal conversations** and space to gather and reflect on issues of power and equity without staff.	Peers **do not** have time or space to meet without staff to reflect on issues of power and equity.
Peers and staff have **regular** discussions about power and equity together	Peers and staff discuss power and equity together regularly but conversations **occur organically**, rather than having formalized time and space.	Peers and staff **do not** discuss issues of power and equity together.
Organizational practices and policies are reviewed with an equity lens on an annual basis and actions are taken to **address all the issues** raised in a timely fashion.	Organizational practices and policies are reviewed with an equity lens on an annual basis and actions are taken **to address some of the issues** raised in a timely fashion. But a plan is developed to address all issues in the future.	Organizational practices and policies **are not reviewed** with an equity lens.

GOLD STANDARD

Staff and leadership engage in multiple capacity building opportunities **annually** related to understanding and addressing issues of power and equity.

ACCEPTABLE VARIATION

Some staff and leaders **occasionally** engage in equity-related capacity building opportunities, others do so more frequently.

UNACCEPTABLE VARIATION

Staff and leadership have **one-off** capacity building sessions related to equity.

CRP WORKBOOK

WHY USE THIS?

- To inspire individual reflections about one's own power, privilege and social location when working with peers.
- To prevent oppressive practices by educating professionals about the influence of biases, prejudices and privileges on their understandings and reactions.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

- Provides professionals working within organizations with the opportunity to learn and reflect on how their power, privilege and social location impacts their working relationships with peers.
- Helps to establish a common language among professionals about significant social structures that influence the ways that peers are engaged by an organization.
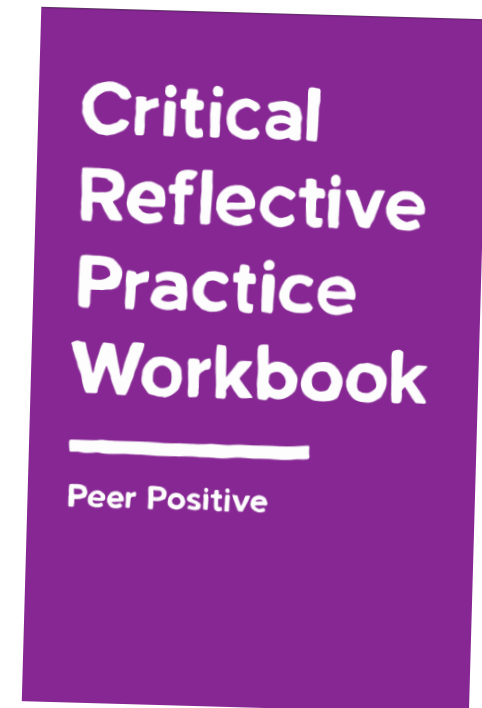
WHEN CAN IT BE USED?

- When professionals are preparing to work with peers.
- When professionals are reflecting on previous experiences of working with peers.
- To inspire discussion during supervision sessions.
- To inspire conversations during team meetings.

WHAT DO YOU NEED TO USE THIS?

Staff and leadership are provided a designated time to reflect on work in relation to power and equity regularly.

WHERE TO FIND IT?

http://www.peerpositive.ca/s/CRP-Workbook.pdf

Critical Reflective Practice Workbook

Peer Positive

4A CARDS

WHY USE THIS?

Provides a clear and consistent structure to guide discussions about power and equity from reflection to action in different contexts.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

Helps to establish a common process for reflecting and acting on issues of equitable peer involvement.

WHEN CAN IT BE USED?

- The 4A Cards are intended to be a guide for the process of critical reflective practice. This tool can be used in many ways, including to:
  - Support critical self-reflection;
  - Work through a situation in a coaching pair;
  - Facilitate a discussion with a group or team on a particular issue;
  - Learn the process of critical reflective practice by working through a fictional scenario;
  - Explain the process of critical reflective practice to someone else.

WHAT DO YOU NEED TO USE THIS?

- Staff, leadership and peers are provided a designated time to reflect on work in relation to power and equity regularly.
- A scenario (real or fictional) to reflect upon.

WHERE TO FIND IT?

http://www.peerpositive.ca/s/4A-Cards-for-CRP.pdf

TUNING-IN TO YOUR OWN POWER & PRIVILEGE

WHY USE THIS?

- Helps individuals develop the habit of preparing to work with others in the co-delivery, co-design or co-review of services.
- Supports personal awareness of how equity issues could be at play in a given situation and reveals potential blind spots.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

Encourages individuals to develop effective habits that support regular reflection about power, privilege and identity in different working contexts.

WHEN CAN IT BE USED?

When preparing to work with others in the co-delivery, co-design or co-review of services.

WHAT DO YOU NEED TO USE THIS?

- Staff and leadership are provided regular, designated time to reflect on work in relation to power and equity.
- Personal awareness and understanding of how your identity relates to a given working context.

INSTRUCTIONS:

Before engaging with peers in the co-design, co-delivery or co-review of services, take some time to read these questions. They will help you remind yourself of challenges you need to be aware of when working with people who have different access to power and privilege. They will also help you reflect on how your own power and privilege can shape the moment, the relationship and the space – for better or worse.

Practicing this exercise regularly will help this become a habitual part of your life and work.

TUNING-IN TO CONTEXT

What are the historical influences on this situation?
What systemic and structural issues are at play?
What affects this time and space?

TUNING-IN TO POWER AND PRIVILEGE

In relation to others and in the given context, what power
and privilege do I hold?
How do I use my power and privilege?
How is this space not neutral?

TUNING-IN TO IDENTITY

Who am I in this context?
What identities do I hold and how do I feel about them?
Who am I interacting with?
What are my assumptions about my identity?
What are my assumptions about their identity?

POWER WHEEL

WHY USE THIS?

- To inspire individual reflections about one's own power, privilege, and social location as it relates to working with peers.
- Helps to establish a common language among professionals about significant social structures that influence the ways that peers are engaged by an organization.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

Encourages individuals to develop a basic understanding of how their identity contributes to experiences of power and privilege individually or in relation to others.

WHEN CAN IT BE USED?

- When professionals are preparing to work with peers.
- When professionals are reflecting on previous experiences of working with peers.
- Used individually to increase personal awareness of how one's identity contributes to experiences of power and privilege.
- Used in a group to highlight relative social locations.

WHAT DO YOU NEED TO USE THIS?

- Staff, leadership and peers are provided designated time to reflect on work in relation to power and equity regularly.
- A safe environment for peers and staff to be able to engage in honest and constructive reflection.

INSTRUCTIONS

This is an individual self-reflection activity. The results can be kept private or can be used to facilitate group reflection. Complete your own picture of power and privilege, keeping in mind the diversity of your communities.

Each segment of the wheel represents one aspect of diversity. Think about each segment and whether you have relatively more or less power in this aspect.

1. For each segment, ask yourself:

    - Are you part of the dominant group in the society?
    - Does your social position pose barriers to accessing services?
    - Or is it frowned upon, dismissed, invisible?
    - Or does more obvious discrimination take place?
    - Does it make life easier?
    - Do I have more power and privilege?
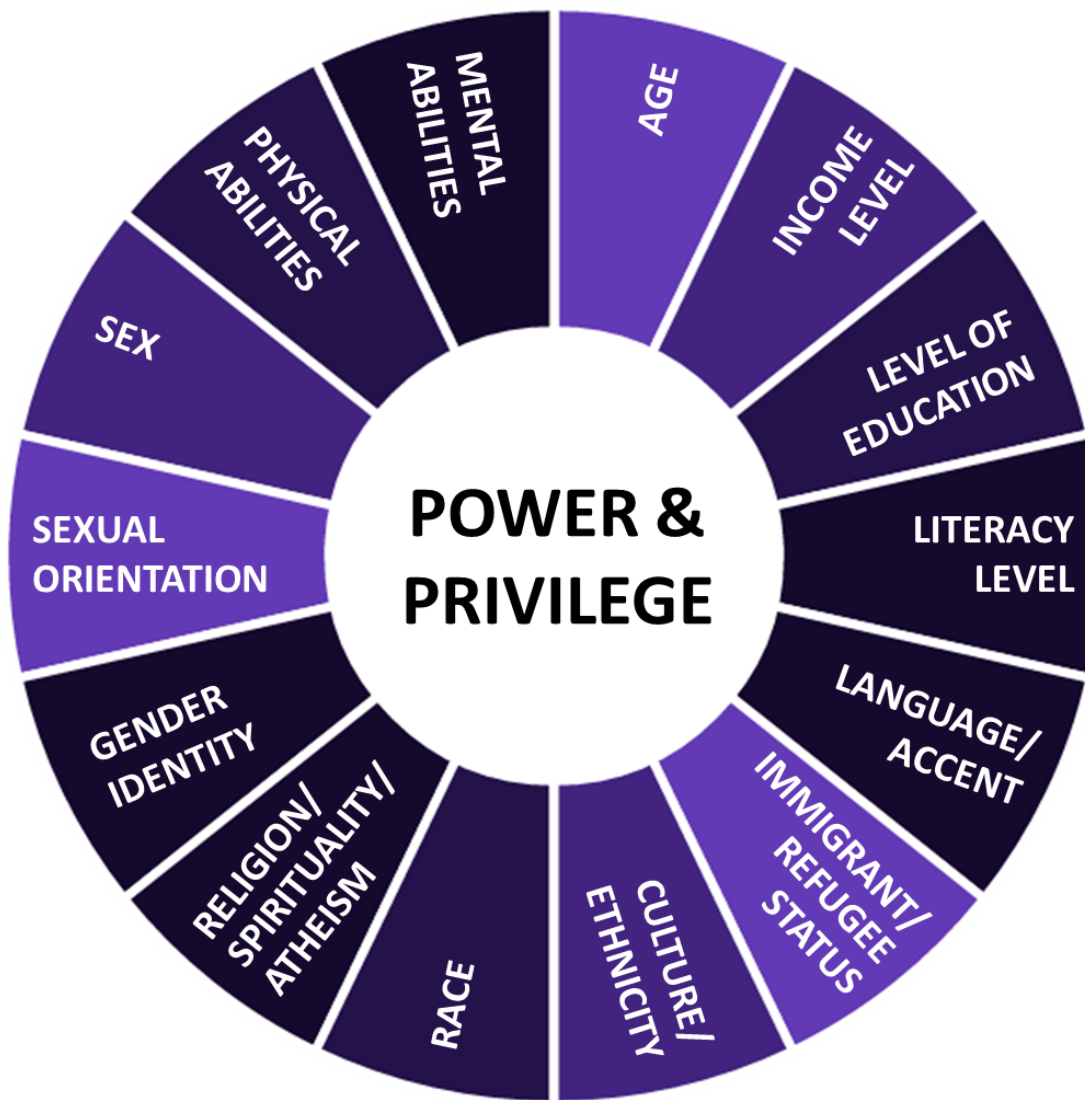
Keep in mind the broader context of your communities, but apply it to yourself.

2. Mark an 'x' on each segment depending on whether you have more or less power in that area. The centre of the circle represents more access to power and privilege, and the edges represent less access to power and privilege.

3. Once you have marked your location on every segment, then connect the 'x's. This gives a very visual indicator of your power and privilege within the community.

ACCOUNTABLE MECHANISMS OF FEEDBACK AND RESPONSE

Seeking feedback is a key evaluation process that allows for the quality improvement of services. Giving the opportunity for service users to actively evaluate services, share their experience of them, and suggest improvements, allows services to solve problems, adapt to the needs of the populations served, and remain relevant and effective. Responding to feedback transparently and in a timely manner allows service users to build confidence while ensuring that services are held accountable to improving by applying the feedback.

In order to create equitable processes of feedback gathering, multiple mechanisms need to be available in order to meet folks who are harder to reach and make feedback processes accessible for all.

RELATED TOOLS

Needs and Values Cards   (pg. 25)
Receiving Feedback Poster   (pg. 26)

OUTCOMES

- Peers feel they play a meaningful part in decision-making processes of the design, delivery, review of services.
- Decision-making processes regarding the design, delivery, and review of services are continuously and transparently responsive to ongoing feedback.
- Peers can see their feedback reflected in services.
- High participation rate of diverse range of equity -seeking groups in feedback and evaluation processes.

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Formal and informal mechanisms are in place in an organization to continuously gather and use feedback from peers.	**Informal mechanisms** are in place in an organization to continuously gather and use feedback from peers.	**Not having any mechanisms** in place to gather and respond to feedback from peers.
Feedback gathering processes are **co-created with peers.**	Feedback gathering processes are **created by staff but peers are consulted.**	**Peers are not consulted** regarding the design of feedback gathering processes.
Organizations follow timely, transparent and accountable processes, where practice is **regularly adjusted** based on feedback.	Organizations follow timely, transparent and accountable processes, where practice is **occasionally adjusted** based on feedback.	Organizations **do not follow** timely, transparent and responsive processes to the feedback gathered.

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Feedback gathering takes place at **relevant and useful times.**	Feedback gathering takes place **when possible.**	Feedback gathering **does not** take place.
Share the **purpose** of feedback gathering with peers, along with the **process** in which the feedback will be used.	Share the **purpose** of feedback gathering with peers.	Gathering feedback from peers but **not sharing the purpose of it or the process** in which the feedback will be used.
Consistently demonstrate that the feedback is being used.	**Occasionally** demonstrate that the feedback is being used.	**No demonstration** of the use of feedback.
Consistently monitor outcomes resulting from changes to practice.	**Occasionally** monitor outcomes resulting from changes to practice.	Outcomes resulting from changes to practice are **not monitored.**

GOLD STANDARD	ACCEPTABLE VARIATION	UNACCEPTABLE VARIATION
Feedback is sought from a diverse group of peers and service users, with **a priority** on peers from equity-seeking groups.	Feedback is sought from a diverse group of peers and service users that is **reflective of** the population being served.	Feedback is sought from a group of peers and service users who are **not reflective of** the population being served.
Different data collection methods are used to optimize the participation or involvement of all groups in the feedback gathering process.	Data collection methods are **adapted** to optimize the participation or involvement of all groups in the feedback gathering process.	Data collection methods are not **considerate** of issues of access for peers.

NEEDS AND VALUES CARDS

WHY USE THIS?

- These cards allow people to practice the skills of listening for expressed but unacknowledged, feelings, needs and values.
- A communication tool that helps people be more open to hearing and understanding experiences and perceptions that differ from their own, without judgment.
- Can support conflict resolution processes within teams.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

- Helps individuals to build and practice the skills needed to communicate without judgment across differences of perspective or experience.
- Contributes to the readiness of individuals to receive feedback regarding the engagement of peers without defensiveness.

WHEN CAN IT BE USED?

- Useful for building new relationships.
- Useful for uncovering/surfacing unacknowledged issues in existing relationships.
- Useful for practicing active, non-judgmental listening skills.

- To contribute to an environment of safety and understanding.

WHAT DO YOU NEED TO USE THIS?

- The Needs and Values cards (physical copy).
- When learning, a group of three people.
- A substantive story of personal experience.
- An environment that values the sharing of honest experiences.

WHERE TO FIND IT?

http://www.peerpositive.ca/s/Need-Values-Feelings-Cards-Combined.pdf

Needs & Values

Feelings

RECEIVING FEEDBACK POSTER

WHY USE THIS?

- Receiving critical feedback can be very difficult, especially when it relates to how your values or identity are expressed through your actions.
- This tool acts as a reference to highlight three common barriers to receiving constructive feedback, and offers suggestions about how to overcome these barriers.

HOW DOES IT ENCOURAGE EQUITABLE PROCESSES OF ENGAGEMENT THAT VALUE LIVED EXPERIENCE?

- Knowing how to receive feedback is a crucial element of being able to translate peer engagement into improving how services are designed, delivered, and reviewed.
- Can contribute to the creation of an environment that promotes a culture of gathering, hearing, and responding to feedback.
- Can help to improve relationships by demonstrating that feedback is valued and taken seriously.
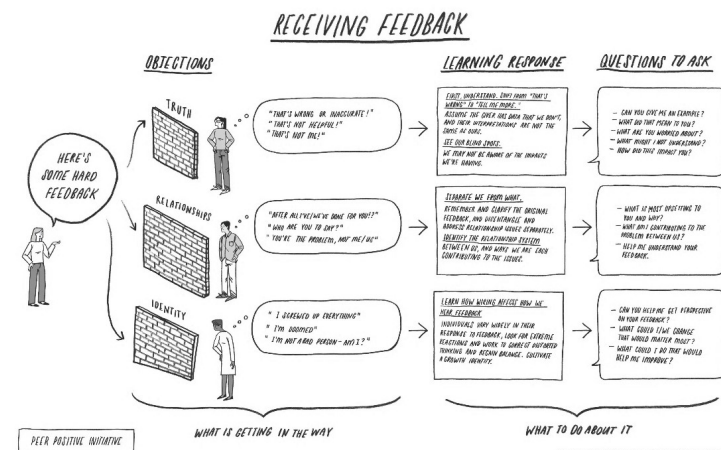
WHEN CAN IT BE USED?

- When preparing to receive feedback.
- After receiving feedback to reflect on what could have been done differently.
- Within a coaching pair.

WHAT DO YOU NEED TO USE THIS?

- An experience of receiving or giving feedback on which to reflect.
- Staff, leadership and peers are provided with time and space to reflect on work in relation to power and equity regularly.

WHERE TO FIND IT?

http://www.peerpositive.ca/s/Receiving-Feedback-Poster-Print.pdf