A Step-by-Step Guide to Building a Peer Support and/or Crisis Response Team

E. Dorie Jones, M.Div, MSW
Partner, Co-Founder, CEO
Crisis Support Solutions, LLC

Welcome!

Thank you for requesting this "step-by-step" guide. Whether your organization is interested in building a peer support program, crisis response team or both, it is our intention to give you a better understanding of the building process.

We have designed easy-to-follow steps for building your support program. We've even added one we call "Step 0: Building buy-in". We recognize that, although you may be "bought-in", organizational leadership still needs convincing. Feel free to share this guide with them - or you use this guide to help form your "pitch". Either way, we hope you find the information you need to get started.

I wrote this guide for someone I identify as "ten years ago me". Ten years ago, or so, I was asked by my supervisor to become the coordinator of our agency's peer support program. The concept was new to me and I had no idea what I was doing. So, I wrote this guide with "her" in mind.

I wrote it for anyone interested in building and maintaining a sustainable support program that will create a "culture of care" throughout your organization. I wrote it because I believe in the "power of the peer" and the ability for one person to provide care and offer hope to another in need. I wrote it because I believe in this program and believe that people are valuable and worthy of support. I wrote it because programs like this have helped me find my footing during personal crisis and grow as a result.

Again, thank you for taking the time to learn more about building a support program. Building something effective and sustainable is never easy. That's why we're here for you every step of the way. Need help now? We're just an email away: info@crisissupportsolutions.com.

Together,
Dorie

STEP 0: BUILD BUY IN

Successful teams have support. Whether you're trying to build a team within your agency, organization or community, you will need "buy in" at multiple levels.

Bottom-up Buy in

The "bottom-up"approach builds buy in at the "worker-bee" level. This formation includes peers recognizing the need to support one another and willing to commit themselves to training and providing support services.

Top-down Buy in

The "top-down" approach builds buy in at the leadership level. Leaders recognize the need for employees to feel supported and safe within the organization. Realizing that peer programs are a cost-effective way to provide a positive work environment, leaders call for a peer and crisis support program. Often times, programs are implemented in reaction to a tragic event - resulting in leadership committing resources for both prevention and intervention services.

No matter the approach, the goal is to garner support and commitment from all involved. Leadership must support through policy implementation, resource allocation, and positive promotion (to name a few). While peers must support by volunteering, receiving training and adhering to core values of confidentiality and professionalism (to name a few).

To build sufficient buy in:

(a) **Identify the need** - that is the *why* you need a peer and crisis support team.

(b) **Bring together stakeholders** - to include those supportive and those hesitant of implementing this program (ex. management, attorneys, finance/budget, etc.).

(c) **Share with the them "why"** - to include relevant facts specific to the needs of your population.

(d) **Openly discuss barriers**, challenges and outcomes for a fully implemented program.

(e) **Measure outcomes** and be wiling to adjust accordingly.

For more on building buy in, visit: https://crisissupportsolutions.com/building-buy-in1/ and download a free PDF presentation to share with your leadership.

STEP 1: DEVELOP POLICY

A policy is a statement of intent, a "living document", that houses the guiding principals of your peer and crisis support program.

A well designed and developed policy addresses many questions or concerns and gets the group synchronous. There have been several issues raised over the years about volunteer programs like peer and crisis support teams. Consistently, the 2 biggest issues raised concern confidentiality and liability.

A well designed policy addresses such issues and becomes necessary education for both leadership and peer.

A peer and crisis support policy often include the following:

(a) **Mission statement** - succinctly defines the essence of your program. A sharply defined purpose explains what your program is about, it's uses and it's intent.

(b) **Authorities and/or Governance** - some agencies and organizations will need support documentation or directives to "authorize" the program and remain in compliance with regulations.

(c) **Scope** - this defines the "reach" and relevancy of the program. Scope will define your "target" audience, that is, the intended users of the program. Scope also often identifies the desired outcomes and intended results for that audience.

(d) **Training and certification** - peer support and crisis intervention are skill-based activities that require a minimum of basic training in order to provide effective support. Your policy should outline training necessary for volunteers to be called "peers". Policy should also outline the step-by-step process for a volunteer to be vetted, trained and approved as an active peer.

(e) **Resources** - although a peer and crisis support program can operate with modest funding, a budget is still necessary for basics like training, "peer gear" (such as lanyards, picture ID or polos for team member identification), technology and applications used to improve communication, statistical collection and analysis, and more.

Resources include "human capital" as well. Depending on your program's identified scope, you may need a handful of volunteers or an entire platoon in order to adequately meet the needs in your area.

(f) **Ethical guidelines and principals** - again, the 2 common barriers in building a peer and crisis support program are typically, confidentiality and liability. A well designed policy must address these 2 issues specifically - and any other concerns stakeholders introduce. Design a policy that sharply defines peer confidentiality and addresses program liability. Be sure to have a written and practiced protocol that includes referrals to mental health professionals, chaplains, medical personnel, or any other professional in a system of continued, next-level care.

STEP 2: DESIGN PROTOCOLS

If policy defines *what we do* - then protocols describe *how we do it*. Programs often include protocols for accepting and dismissing (or disciplining) a peer. Protocols may also include recording and reporting statistical data concerning program utilization. If your program is going to survey participants regarding satisfaction, then there should be a protocol for gathering and reporting that information as well.

Since tragedy doesn't always occur during 9-to-5, your organization may need to address issues of overtime or "comp time" for peers responding. There must also be protocols for contacting individuals and/or groups in distress. Such as:

(a) **Individual support and crisis response** - Protocols may include (but not limited to): peer role identification, making a “cold call”, referring to another team member, consulting with another team member, referring to the next level for continued care, following up and more.

(b) **Group support and crisis response** - Protocols may include (but not limited to): gathering information from a credible source, securing appropriate approvals, deploying an advanced team, protocols for large gatherings and small groups, as well as “debriefing” the peer responders and more.

STEP 3: RECRUITING

It may sound strange, but not everyone is cut out to be a volunteer in a peer support program or member of a crisis response team. Recruiting is crucial for building an effective program. It takes all of us to build an exceptional program and just one of us to tear it down.

Before applications or interviews, your program’s core values must be set. The people you accept are determined by the values you ascribe. The program is only as good as it’s people - and people attracted and accepted to a peer and crisis support program are those of trustworthiness, integrity, compassion, kindness, professionalism, respect and more.

Some programs include a certification process. This process may include (but not limited to):

(a) **Application** - completing an application is often the first step towards acceptance into a program. The peer and crisis support application often includes a brief explanation of the program, while emphasizing core values and expectations. For programs being built within an agency or organization, the application may also include a section for supervisors. This section may contain information specific for managers and a signature block for affirming or permitting his/her employee to join the volunteer program.

(b) **Resume** - you may insist a resume be submitted by the applicant along with the completed application. A resume will give you information about the applicant's work history, educational background and other various bits of information that you may like to know and could be helpful when coordinating and disseminating peer work.

(c) **Interview** - after paperwork is reviewed, an interview is typically scheduled. Interviews are best in person. However, agencies building national programs may only be able to schedule a conference call or video chat. Either way, have a list of questions prepared for the interview. These questions will be specific to the needs of your program. If you are building a program within an organization, you may want to consult staff attorneys. The vetting process, to include the interview, should be included in your program's protocols.

(d) **Quality control** - some people look great on paper, while others don't interview well. It can be quite a challenge to determine who's a "good fit" for your program. Instead of you solely owning that responsibility, consider garnering input from others. This is a peer support program after all. Therefore, contact "peers", that is, the applicant's colleagues and learn from them about the applicant. Do the colleagues find the applicant trustworthy? Is this someone they would talk to when they're upset? What concerns, if any, does they have about the applicant joining the support program?

While this consult is a great way to get a better perspective of how your applicant is perceived and will be received, this is also a great opportunity to educate colleagues (and even supervisors) on the program and its purpose.

A few caveats: (1) again, if you are building a program within an organization, discuss first with staff attorneys and (2) include this portion in the protocols section of your policy and (3) inform each applicant that you will be contacting their colleagues. It is important for applicants to understand that they are not being singled-out, instead, this is an approved part of the vetting process.

STEP 4: TRAINING

As mentioned previously, peer support and crisis intervention are skill-based efforts. Although there are various intervention models and training programs, there are still basic "industry" standards that every peer and crisis response team member should know and be qualified to provide. (Crisis Support Solutions has designed, utilizes and provides training on various intervention models for individuals and/or groups in distress).

In order to set the expectation for education and peer performance, your policy should consist of basic knowledge, skills and abilities (KSAs) and reflect those standards through training. Here are a few examples of KSAs found within Crisis Support Solutions training programs:

(a) Working knowledge of language, terms and nomenclature used within the program. Appropriate use of the terminology improves communication among teammates and enhances credibility for those we serve.

(b) Basic understanding of stress and various reactions that people experience under stress.

(c) Basic understanding of crisis and the various crisis reactions experienced following an overwhelming incident.

(d) Skillful communication with those in distress (to include listening, validating, exploring and furthering)

(e) Proven method for assessing and triaging

(f) Effectively stabilizing and addressing the various identified reactions (for an individual or for a large or small group)

(g) Practices for caring for self while caring for others

(h) Ethical guidelines and best practices for providing peer and crisis support

It is imperative for training delivery to match and meet the needs of your program. Before you select and fund basic training - first - be certain of your outcomes.

A familiar approach to training delivery is “always start with Z”. What do you need your team to know, then be able to do, when they walk out the door and into their peer role? Since training dollars are often scarce, be sure to capture the most “bang” for your “buck” by securing a program that delivers the “Z” that your team needs to be effective in the field.

STEP 5: ORIENTATION

I remember going with my youth group white water rafting. It was my first time and I had no idea what I was doing. We were all fitted for life vests and helmets - equipment I usually associate with danger. Being a self-proclaimed “scaredy-cat”, that was the moment when my worry skyrocketed and I realized how incredibly under-prepared I was for this “adventure”. I was relieved when our “Guide” called us all together for *orientation*. He instructed us on how to hold the paddle, where to plant our feet and what to do if we go overboard (wait! what?). I didn’t feel fully prepared following our brief orientation; but it did help in knowing what to do, what not to do and how to call for help when finding yourself suddenly outside of the raft.

I often think of peer and crisis support as being one’s personal “rafting guide” through the rough and hostile waters of unexpected tragedy. Before gearing up and jumping in, orientation is needed to familiarize peers and team members in this new “adventure”.

It’s important to know what is expected of us. New peer members need to know what is expected of them. Successful peer and crisis support programs incorporate “new peer orientations” for those joining the team. New peer orientation can be formal or informal, in-person, conference call or video chat, “live” or recorded. However it’s delivered, orientation should include (but not limited to) the following:

(a) **History and background** - Peer and crisis support programs do not form overnight. They are usually - painstakingly - championed until adequately designed and formally adopted and. It’s important for new peers to hear the history of their program’s development.

Maybe your program is in the design-phase, currently being developed. Then it’s important to recognize that you are making history right now. Your selected team is pioneering peer support for your organization. These are exciting times. These are nerve-wracking times too, but exciting all the same.

(b) **Accountability** - no one operates in a vacuum, especially peer and crisis support teams. Everyone is accountable to someone and something. New peers need to know their “Chain of Command”. Who is their Coordinator? How is the program funded? Who “authorized” the program and who is ultimately responsible for the efficacy of it? Perhaps most important for the new peer, who is their point of contact - or POC - with future questions, worries or concerns?

(c) **Roles and Rules** - every relationship exists within the guidelines of “roles” and “rules”. Generally, conflict arises when there is confusion or miscommunication within either one of these. Peers need to be clear the extent of their involvement and purpose for their presence.

The role of “Peer” or “Crisis Responder” is usually an ancillary duty. In other words, this is not the role you were hired to perform 100% of your work day. Instead, you were hired to be an agent or officer or nurse or teacher or minister or [fill in your position here]. So then the question often arises: WHEN am I a Peer? It’s an important question and one that needs to be addressed during orientation.

It is also necessary to introduce your peer to the “rules” - or guidelines - of your program. Again, we need to know what is expected of us. During orientation, provide a copy of your program’s approved policy and review the rules and expectations. This would also be the time to explain egregious violations (such as violating confidentiality) and the disciplinary or dismissal procedures that will result from such actions.

(d) **Reporting requirements** - as a form of accountability, peers need to be aware of mandatory reporting requirements. For example, most program policies state exceptions to confidentiality. These exceptions are typically intent to harm self or someone else. If / when a peer suspects a colleague's intent to harm self or someone else, the peer needs to know who to contact immediately. Again, if you are building a program for an agency or organization, consult staff attorneys and outline the referral process in your protocols or procedures manual.

(e) **Conflicts of interest** - many peer policies addresses relational conflicts when performing peer or crisis support duties. These relational conflicts may include (but not limited to) those that impair sound judgement or objectivity, those that risk harm to anyone involved, sexual entanglements and so on. When a new peer finds him/herself in conflict, policy and/or the program coordinator can provide insight for making appropriate referrals.

(f) Expectations for **continued learning** and/or professional development - orientation is a great place to address the obvious question: Now what? Peers have been vetted, accepted or approved, received basic training and attended orientation… now what? Some programs have included a mentoring program and from here, pair a new peer with a veteran peer leader. Some programs may schedule team meetings, coaching calls and webinars for continued learning.

Whatever the extent of your program's capability at this time, an important closing point to your orientation is to address the "now what?" that will naturally rest in the peer's mind. It is important to inform new peers that continued learning and skill-development are necessary for ongoing effectiveness.

At Crisis Support Solutions, we have often used the tag: *Be Capable.* We recognize the need for Helpers to feel - and be - capable in effectively addressing any individual or group in need. This confidence requires a commitment to learning. As you design your program, be sure to build in avenues and funding for advanced training, coaching and consulting for deepening peer and crisis capability.

STEP 6: RECORD OUTCOMES

This is one of my favorite steps in the process - and one, I feel, most often overlooked: collecting statistical information. Now I get it that no one, I mean no one (including me) enjoys sitting down to a database and inputting data. There are many appropriate words to describe this process: boring, trivial, pointless, unappealing and so on. But one the data is in, the information that we can glean - then share - can be remarkable (and make the process so worthwhile). So here are a few things you may need to know when collecting data:

(a) Determine what information you want to capture. Note: this is “data” only. There should be NO identifiable information recorded anywhere at any time.

Also, be sure to capture what you *NEED* to know, not what’s *nice* to know. Peer support and crisis support are typically volunteer programs. Essentially, we are asking these helpful souls - after sitting with tragedy and trauma - to take another minute to report data. This is not the “fun" part. So as much information as you may like to have - keep in mind the reality of what information you may actually obtain. By asking too much, Peers may get overwhelmed by the process and you may get nothing at all.

(b) Input stats into an electronic database. I prefer an online database, accessible from any computer - as long as that database is secure and only accessible through a secure and verified login account. I also prefer a database that “filters" the information and can generate reports based on your reporting needs. Need to compare one month to another? Is there an increase in contacts over the holidays? Do we spend more time supporting people with relationship stress or work stress? How much time do we spend with people on average?

(c) The type of data you collect will be based on the information you need to report. As you build your database, consider including leadership in the discussion. In organizations where management approved funding for the program, then management may insist on data to support continued funding. As you discuss with management about reporting data, this may be an opportunity to emphasize program policy on confidentiality and information sharing.

(d) Finally, most data captured reveals insights on program utilization. For example, data can reflect a 10% increase in the number of contacts this year in comparison to last year. This increase speaks to program utilization - or usage. There is a lot that we can glean from analyzing program utilization; but this type of data doesn't truly speak to program satisfaction. We, of course, can infer that the program is perceived positively when seeing numbers increase or data suggesting that employees are recommending their colleagues to utilize the program.

But if you are interested in gaining information that specifically reflects program satisfaction, than consider an additional measurement tool. There are various methods for securing such information. Essentially, you are asking those who received direct support to then "rate" his/her experience. The tricky part is often in the timing. When is the "right" time to hand someone a card or ask them to visit a website and "tell us how we did…"? The information garnered could prove invaluable to the future of your program - but like with all things in peer and crisis support - be mindful as you go.

STEP 7: CONTINUED DEVELOPMENT

As briefly covered in Step 6 of this guide, continued development is essential for capability. You don't just want your "roster" to reflect that you have peers - you want your roster to reflect that you have peers capable to handle any stress call that comes in. While knowledge and a few skills are attained in basic training, it is a purposeful path of continued development that strengthens ability and creates a sense of capability within your team.

The path of this training and professional peer development is determined by needs of your population. Some peers are needed to be present when a death notification is made. Some organizations "use" peers as apart of their prevention programs, expecting peers to recognize warning signs for potentially troubled or distressed.

Whatever the need, emphasis on continued learning and development builds capable peers.

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Like what you've read and ready to get started?

The first 3 steps of our 7 step process is covered in our one-day, online course: Policy, Protocols and Ethical Practice.

Click here to download syllabus and learn more.

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