PEER MENTORING TOOLKIT

2018

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Foreword

The Innovation Project was developed to enable people who have realised personal benefits through their engagement with Moving on Tyne and Wear, to use their own experiences to help others to do the same. The focus of the Project is to encourage lifestyle changes for people with long-term conditions who are experiencing health barriers to gaining employment.

Glossary

Throughout the toolkit, there will be reference to the following terms:

> ➢ <u>Peer Support Co-ordinator</u>; the person who supports the operational running of the project, including training and supervising the volunteers.

> ➢ <u>Navigator</u> is the term used to describe a worker that supports clients who are out of work due to complex health issues and other barriers, to get back into training, volunteering or employment.

> ➢ <u>Client</u> is the term used to describe recipients of the Peer Mentoring service.

> ➢ <u>Peer Mentor</u> is the term to describe a volunteer who has had a positive experience of support from either a Navigator or Link Worker to help them overcome barriers to accessing training, volunteering or employment. The Mentor has had a positive experience and helps their peer to access the support needed (for example, attending an activity or appointments).

> ➢ <u>Buddy</u> is the term used to describe a volunteer who is assisting the Mentor to undertake their role. They would be available if the Peer Mentor is unable to support the client, for example, if the Peer took a break from volunteering due to a change in personal circumstances (such as progression to employment or ill-health).

> ➢ <u>Steering Group</u> is the term used to describe the core representatives that co-produced this toolkit.

<u>Volunteer Centre Newcastle (CSV Project)</u> refers to The UK Volunteering and Social Action Charity.

<u>DBS</u> refers to the Disclosure and Barring Service.

<u>MBF</u> refers to the Mentoring and Befriending Foundation. The MBF provides guidance and support to organisations and practitioners involved in mentoring and befriending.

Introduction

The Project recognises the significance of how peer mentoring can inspire and support behaviour change in others. The experience of helping others can then benefit the Peer Mentors as they gain skills and experience to improve their employability.

This toolkit has been co-produced with clients accessing the Moving on Tyne and Wear (MOTW) service, as well as partnership agencies including Ways to Wellness and Moving Forward Newcastle. Initially, clients participated in focus groups which led to the development of a Steering Group. The Steering Group has discussed and shared ideas and lived experiences of what has worked well for them to inform best practice as well as aspects that need to be considered that may be problematic.

This toolkit sets out ways to identify, train and nurture Peer Mentor volunteers; people who have benefitted from using MOTW (or partner agency) and would like to help others to do the same. It is a working toolkit and as such, will be reviewed in line with any changes made to the processes and procedures that underpin the project's operation. Reviews of this toolkit will be undertaken on a regular basis to ensure the project evolves effectively and that the systems in place are fit for purpose. Crucial to these reviews is continued feedback from the volunteers and clients.

The toolkit has used good practice recommendations from the MBF and if they were followed, would lay the foundations for meeting the elements needed to work towards their Approved Provider Standard (APS)[1].

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[1] APS is the national quality standard developed specifically for mentoring and befriending projects

Mission, Aims and Objectives

It is important to identify what the mission, aims and outcomes are, so the project can evaluate its success and identify areas for development and improvement.

The Project mission
What positive impact will the project make if the specific aims are achieved?

> ➢ The project's mission is to encourage lifestyle changes for people with complex health issues and other barriers, to enable them to get back into training, volunteering or employment

The specific aims of the project which include outcomes for individuals
What will the project do?

> ➢ Enable people to develop strategies to manage their condition(s) and enhance their physical and emotional wellbeing
> ➢ Reduce feelings of isolation, despair and fear by providing inspiration and hope
> ➢ Build up and enhance people's confidence and self-esteem in order for them to make lasting and sustainable changes for better health
> ➢ Enable Peer Mentors to feel empowered and recognise their skills, knowledge and experience
> ➢ Enable people to engage in appropriate support through other organisations as appropriate
> ➢ Enable clients to be inspired by their Peer Mentor and potentially work towards being a Peer Mentor

What are the objectives
How is this going to happen?

> ➢ To offer the opportunity for people to engage with a Peer Mentor so they can develop strategies for self-management and care
> ➢ To offer support to attend activities/appointments as needed, with a view to enabling clients to be able to attend independently
> ➢ To identify, train and support clients to become Peer Mentors

COMMUNITY FUND

European Union
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Moving On
Tyne & Wear

Model of support

This toolkit outlines a model of delivering structured support with clear boundaries for the client and Peer Mentor. Regular monitoring should be undertaken by the Peer Support Co-ordinator, including obtaining feedback from clients and Peer Mentors to ensure the project is of a high quality standard and outcomes can be measured.

Suggestions of how clients are supported by their Mentor?

The Steering Group felt that the support should be flexible to suit the needs of a range of people, and to overcome accessibility issues for certain disabilities. This could include:

- ❖ Attending groups/activities to help with self-management e.g. Diabetes Support Group
- ❖ Attend appointments to promote wellbeing e.g. with a Health Trainer
- ❖ Peer-facilitated support groups
- ❖ Telephone/text or email support for people that find it difficult to leave their home
- ❖ Skype/phone line support (e.g. similar set-up to 'Night Owls' radio programme)
- ❖ E-mentoring with a private chat room
- ❖ Social media support such as Myspace/Facebook/webpage/Twitter

The Peer Support Co-ordinator should support the matched client and Mentor to develop a plan of the best way of keeping in contact. The level of support would be reviewed on a regular basis. It is important to note that telephone/email contact should be undertaken via a project mobile and/or email. Meetings would be held in the local community, rather than home visits. Appropriate measures must be in place to ensure data protection and confidentiality policies are adhered to, as well as the boundaries of what can/cannot be shared in different forums, for example, social media.

Engagement in Peer Mentoring

Eligibility criteria for the Project:

- People aged 18+ who experience complex health issues and other barriers to get back into training, volunteering or employment

- A voluntary commitment and willingness on the part of the client to accept the support

How Peer Mentors are identified

Clients have regular reviews with their Navigator and could explore the opportunity to progress onto the role of a Peer Mentor. However, there is also the potential to advertise externally and invite people to apply for the position who have had a positive experience of engaging with similar services, but perhaps through a different referral route, for example, Ways to Wellness/Moving Forward Newcastle/Launchpad.

Buddy volunteers

The Buddy roles could be undertaken by anyone who has an interest in this field, for either personal satisfaction and/or people who want to gain experience (but not as a placement) for their career progression.
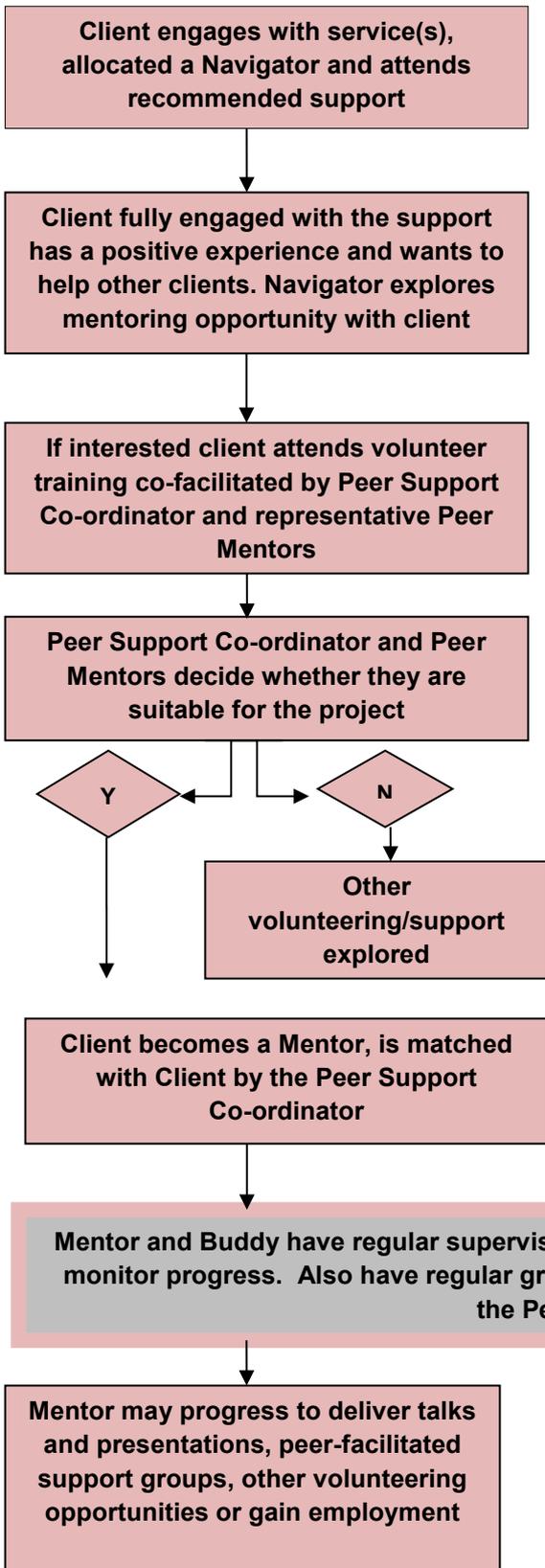
The diagram over the page illustrates how to become a project volunteer and how the Navigators and Peer Support Co-ordinator should support this process.

There were mixed views about whether the Buddy role would be an external volunteer and an idea was proposed that the project could 'buddy up' two Peer Mentors for support instead. Given the fluidity of the project, and the need for it to be responsive to the needs of the clients and Peer Mentors, both models could be trialled to explore which works best. The project would encourage peer support amongst Peer Mentors as an ongoing means of support irrespective of which model was adopted.
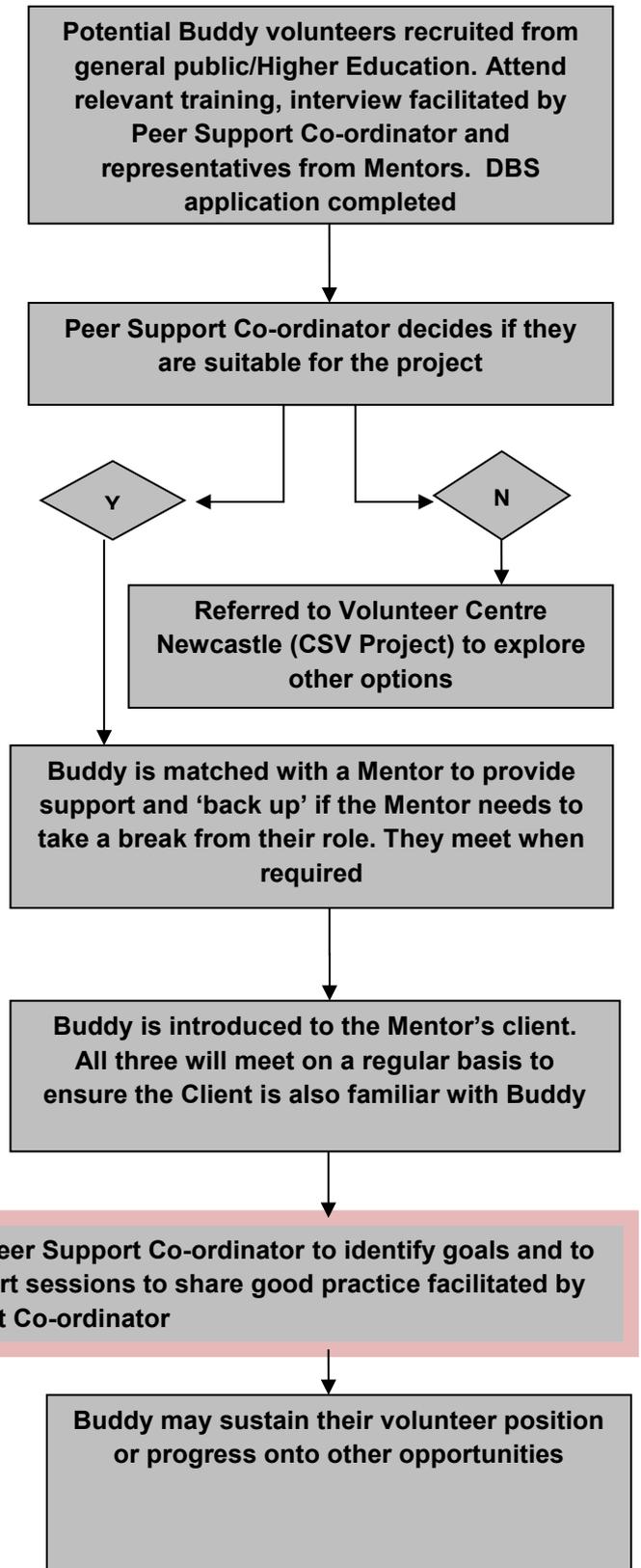
Diagram 3: Flow charts to illustrate the processes of becoming a Peer Mentor and Buddy

Peer Mentors

Client engages with service(s), allocated a Navigator and attends recommended support

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Client fully engaged with the support has a positive experience and wants to help other clients. Navigator explores mentoring opportunity with client

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If interested client attends volunteer training co-facilitated by Peer Support Co-ordinator and representative Peer Mentors

↓

Peer Support Co-ordinator and Peer Mentors decide whether they are suitable for the project

Y ← → **N**

Other volunteering/support explored

Client becomes a Mentor, is matched with Client by the Peer Support Co-ordinator

↓

Buddy

Potential Buddy volunteers recruited from general public/Higher Education. Attend relevant training, interview facilitated by Peer Support Co-ordinator and representatives from Mentors. DBS application completed

↓

Peer Support Co-ordinator decides if they are suitable for the project

Y ← → **N**

Referred to Volunteer Centre Newcastle (CSV Project) to explore other options

Buddy is matched with a Mentor to provide support and 'back up' if the Mentor needs to take a break from their role. They meet when required

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Buddy is introduced to the Mentor's client. All three will meet on a regular basis to ensure the Client is also familiar with Buddy

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Mentor and Buddy have regular supervision with Peer Support Co-ordinator to identify goals and to monitor progress. Also have regular group support sessions to share good practice facilitated by the Peer Support Co-ordinator

Mentor may progress to deliver talks and presentations, peer-facilitated support groups, other volunteering opportunities or gain employment

Buddy may sustain their volunteer position or progress onto other opportunities

How will the role(s) be advertised and promoted?

The volunteer position(s) can be advertised via:

- Websites of the host organisations
- GP surgeries
- Social media
- Leaflets/flyers
- Local media
- Community groups
- Universities/colleges
- Jobcentre Plus
- Voluntary organisations
- Library

How will people apply?

It is important that the application process is straightforward or potential volunteers could lose interest. Similarly, if the volunteering begins soon after the application process is completed, volunteers are putting their learning into practice whilst it is still fresh in their mind.

How will people be selected?

All potential volunteers will complete an application form (see Appendix 1) and have an initial informal chat with the Peer Support Co-ordinator about the role. Appendix 2 sets out examples of questions that should be asked as part of an initial informal meeting about volunteering.

When a potential volunteer decides they would like to undertake this role, the project should contact their named references and the Disclosure and Barring Service (DBS, previously CRB) to check their criminal record history and whether the person has had any cautions or convictions. An individual may still be able to volunteer, dependent upon the circumstances. This would be discussed fully once the information was received from the DBS. The wellbeing of clients is paramount and the project has a duty of care to ensure that this is at the core of decisions, when considering who should volunteer for the project.

Practical Considerations

State Benefits and Volunteering

Peer Mentors and Buddy volunteers may be in receipt of certain benefits, for example Universal Credit. It is important that the volunteer checks with the DWP prior to engagement with the project to ensure they have details about the volunteering. The reasons for this are:

- The volunteer could be subject to a sanction if they put the project volunteer role as a priority.
- The volunteering may enhance opportunities for employment and may widen the jobs the volunteer is able to apply for

In the training for all volunteers, the project needs to make it clear that there is an understanding about these issues and that it is the responsibility of the volunteer to ensure that they adhere to the rules of the benefit they are receiving. If a volunteer needed to attend an appointment or interview at short notice then this would be accommodated by the project and appropriate arrangements for cover of their volunteering activity would be made.

The Peer Support Co-ordinator and navigators should set up and maintain links with Jobcentre Plus in the event they need to liaise with the team regarding any issues affecting volunteers.

Barriers to Volunteering

The Focus Groups identified the following barriers and ways they could be overcome:

Barriers	Support needed
Physical/mental health issues	Understanding from project about absence from role if unwell
Finances	Project providing 'out of pocket' expenses
Time – pressure of work/family commitments/childcare	Exploration of time available with Co-ordinator. Recognition that this could be a small window of time but make a huge difference to someone else
Lack of confidence/knowledge	Training and reviews to identify ongoing support
Travel – not knowing where to meet people/geographical knowledge	A map of potential meeting locations/cafés to be circulated amongst the Mentors
Feeling unequal to paid staff	To feel valued in your role – opportunities for training/supervision/celebration events
Fear of prejudice/judgement/language barriers	Project to work in an inclusive way that ensures all volunteers/clients feel welcome and equal

Operational considerations

How to prepare volunteers for their role?

All volunteers should have training prior to starting their role. The initial training should include an overview of what the project is, what the volunteering role is and what happens following the training, if the participants would like to go ahead and become volunteers.

An initial 'Awareness Day' should be held as it is the first opportunity to find out about what the project is and what would be entailed for the volunteer role. See Appendix 3 for a possible programme for the 'Awareness day'.

Further training

After the Awareness Day, the Peer Support Co-ordinator will meet with each potential volunteer for a meeting. This is an opportunity to decide if the person is right for the project, or if they need additional support. If a potential volunteer (Peer Mentor or Buddy) needs additional training or support then this should be provided, where possible. In the event that someone is unsuitable for the project they should, with consent, be signposted or referred, to something more suitable for them.

Following training, the potential volunteers should be provided with feedback forms. This will assist future training and feed into the overall evaluation process of the project. Volunteers should attend relevant ongoing training in line with service need.

How will Peer Mentors be matched with clients?

Peer Mentors and clients will be matched on their shared interests and compatibility. A significant part of the matching process relies on the skill of the Peer Support Co-ordinator to build up effective relationships with all parties; the volunteers (Buddies and Peer Mentors) as well as the clients engaging with the project. See Appendix 4 which details guidelines for matching Peer Mentors and clients.

What if the match doesn't work out?

It is important that planning and preparation is made for all parties in the event that a match may not work out. It is inevitable there will be times when the match should not go ahead. It is important that this possibility is explained to the Peer Mentor and the client prior to an initial introduction. The Peer Support Co-ordinator needs to build time in for a debrief in the event of a match not going ahead, as either party may feel cross, rejected, or hurt by the decision.

There may be a number of reasons for two people not getting along. It is important for the Peer Support Co-ordinator to find out what those reasons are and to ensure there has not been any dispute or inappropriate behaviour.

The Peer Support Co-ordinator needs to be mindful of any background information that may be relevant in terms of an individual's expectations for the service and previous behaviour towards other people (for example, dependency issues).

If a client or volunteer is being discriminatory, then consideration needs to be made in formulating an action plan to either address the underlying belief through training or through discussion.

Mentoring Agreement

An agreement between the Peer Mentor and the client should be in place and signed by both parties. It can be short, but must include expected behaviour from both parties. An example can be found in Appendix 5.

As part of the introduction, the Peer Mentor and client will discuss what they hope to achieve from working together and develop an action plan. The Peer Mentor should support the client to identify what their specific goals are. Appendix 6 illustrates an example of an action plan for a client.

Appropriate boundaries

Boundaries are essential for the protection and safety of the client and the Peer Mentor. If clear boundaries are in place this means:

- Both parties can feel clear about the purpose of their work together
- The client can feel confident about sharing sensitive issues
- Both parties are aware of the limitations of the relationship, i.e. the difference between the role of a Peer Mentor and how that differs from a friendship

Appendix 7 outlines the boundary guidelines given to both the Peer Mentor and the client.

Reviews

The Navigators and Peer Support Co-ordinator need to ensure clear boundaries and management processes are in place for the service to be effective and for the clients and Peer Mentors to fulfil their potential.

It is important that the clients and the volunteers have regular reviews with each other and also, periodically with the Peer Support Co-ordinator (good practice would be every 4-6 weeks) to ensure the relationship is developing well, issues are addressed at the earliest point and to ensure a dependency is not being created. One of the specific aims of this project is to enable people to develop strategies to manage their condition and enhance their physical and emotional wellbeing. The Peer Mentors' role is to nurture a relationship that can enable the individual to meet their goals.

Supervision for Peer Mentor Volunteers

Regular individual and group supervision are essential. Volunteers, as with paid staff, need motivation, encouragement, reassurance and advice to ensure that they are undertaking their role effectively and safely.

Supervision gives volunteers the opportunity to voice concerns that are confidential. Group support enables volunteers to share ideas for good practice, explore challenges and celebrate accomplishments.

Another important aspect to the supervision is the opportunity to discuss the Peer Mentors' journey in terms of their development and whether they are ready to move on to another challenge, such as paid employment or volunteering in another organisation.

Supervision for Buddy Volunteers

Buddy volunteers should also have regular supervision to discuss the relationship with their Peer Mentors and on occasion the client (if the Peer Mentor has taken a break).

A template for supervision can be found in Appendix 8.

Suggestions for supporting Peer Mentors and Buddy volunteers

Telephone support	Project staff and volunteers should have regular contact with each other. A point of contact at the project should be available to respond to queries, concerns and give support and advice to volunteers (and clients)
Texting	Texts could be used to remind volunteers about appointments (if needed), update about events or simply to 'touch base' with a volunteer
Social networking site	A 'Members only' Facebook group could be set up, similar to the one for the 'Healthworks' Peer Mentors. Volunteers could share ideas, promote activity and message each other for support
Training opportunities	Opportunities for further training and development to gain qualifications, accredited or in-house training should be promoted to all volunteers and clients. For some volunteers, development of a CV is part of their motivation for volunteering, for others they may want to engage with further training for enhancement of their skills base
Newsletter	A newsletter could be developed by clients, Peer Mentors and Buddy volunteers. This could include new introductions of volunteers/celebrations of events
Celebration events	Events can enable volunteers to develop a network with each other and to feel part of a team.

Table 2

Managing endings

Clients should always be aware that there will be an end point and a 'move on' from the Peer Mentors project, which could entail the client becoming a Peer Mentor. The ending of their work together needs to be planned (as much as circumstances may allow) and celebrated. The Peer Support Co-ordinator and the Peer Mentors need to reinforce that when that stage is reached, this is a positive step of 'moving on'.

It is worth noting that for some clients, issues of attachment and loss may have been longstanding. The Peer Mentors' project needs to acknowledge and respect that a client may struggle with the ending of the relationship, however fruitful it may have been. It is therefore, the job of the navigator to ensure appropriate steps are taken to include the wider network of support for the person. This could include a referral for counselling services and/or contact to their GP (with the client's consent).

Strategic considerations

Waiting list

The Peer Support Co-ordinator should ensure that the waiting list is managed effectively and that potential clients are given an estimated timescale as to how long the support will be in place. If the waiting list becomes too long, then a decision should be made whether the waiting list needs to be closed for a period of time.

Steering group

A Project Steering group should be set-up and have representation from key stakeholders and partners. Clear terms of reference need to be decided between the members of the group and regular meetings should be planned to monitor the progress of the project.

Policies and procedures

Key policies must be adhered to. Clients and volunteers (Peer Mentors and Buddies) should be familiarised with relevant policies as part of their engagement and involvement with the project.

Partnership working

Effective communication is key to the success of this project, in terms of incoming referrals, dealing with complaints efficiently and ensuring that ideas for good practice are shared. Partnership working could also lead to collaborative efforts, shared use of resources and training opportunities.

Monitoring, Evaluation & Quality Assurance

It is essential to monitor and evaluate the project in order to demonstrate its success and how effective it is in terms of the impact and difference it makes to people's lives. The process of monitoring and evaluation highlights strengths, limitations and changes needed to improve the quality of the service being offered.

Information should be collected about the progress of key aims, objectives and targets and any information required for the funding bodies of the project.

The MBF recommend that projects involve clients and volunteers (in this context Peer Mentors and Buddies) in the planning and development of the monitoring tools. Feedback and ideas for monitoring tools could be encouraged from clients and volunteers at reviews and during supervision and group support.

Data collection System

A system to collect the data should be put in place. This may be in the form of an excel spreadsheet, database, paper based files or a combination of different methods. Appendix 9 is a template for data collection. The MBF resource 'Monitoring and Evaluating outcomes in Mentoring and Befriending'[2] is a useful guide. Once the project is operational, it can be explored as it will guide practice and enable the Peer Support Co-ordinator to make informed choices about the templates and methods to apply (in collaboration with clients, volunteers and the navigators). The list below gives examples of data that should be collected for ongoing monitoring and evaluation of the project:

- Number and source of referrals onto the project
- Number of volunteers recruited, turnover and reasons for leaving
- Start and end date of support
- Number of support sessions
- Number of telephone sessions
- Equal opportunities monitoring data
- Goal planning (for Peer Mentors, Buddy volunteers and clients)
- Feedback questionnaires from the clients and volunteers
- Volunteer diaries logging each session and progress of goals
- Case studies
- Minutes of group support meetings

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[2] Available at http://www.mandbf.org/quality-standard/good-practice-examples/monitoring-and-evaluation Hard copy purchased and stored at Mental Health Concern, Head Office

Quality assurance

There is an opportunity to apply for an Approved Provider Standard (APS) which is the national quality standard designed specifically for all types of mentoring and befriending projects. Projects which meet the requirements of the standard are accredited for three years. For more information about the accreditation process you can visit:

http://www.mandbf.org/quality-standard#sthash.eo9mFTD0.dpuf

Appendices

Appendix 1: Application form for volunteers (Peer Mentor & Buddy)

Name: _____

Address: _____

_____

What qualities and skills do you have that would make you a good mentor/buddy?
_____
_____
_____

Please list any hobbies or interests

_____
_____
_____
_____

We aim to create a positive environment that enables all volunteers to realise their full potential. So we can consider any appropriate adjustments to the volunteer environment and better support you in your role, please give details of any disabilities or health issues:

_____
_____

Please indicate your availability by ticking the appropriate box(es):

	Morning	Afternoon	Evening
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

Do you have any unspent criminal convictions under the Rehabilitation of Offenders Act 1974? Yes/No (please circle)

If yes, please provide details:

_____

Please note that a criminal record is not necessarily a bar to volunteering. However, due to the nature of mentoring, any convictions will need to be taken into account.

References:

Please give the names of two people who are able to support your application to become a Peer Mentor:

1. Name: 2. Name
Address: Address:
Tel: Tel:
Relationship to you: Relationship to you:

Your details
Your details will be kept in accordance with the Data Protection Act (1998/2003). They will be held securely and confidentially and will only be accessed by authorised personnel.

Declaration
I declare the information given on this form is correct. I also give permission for the referees listed on this application to be contacted by the project.

Signed: _____

Date: _____

Appendix 2: Example questions for informal meeting

- What do you hope to gain from the experience of volunteering?

- What relevant skills, interests and experience do you have?

- What is your understanding about the issues clients may face?

- Any health issues that may be relevant to the role?

- Any resources you may need (for example in relation to disability)

Appendix 3: Awareness Day programme

- Welcome & introductions

- Aims of the programme

- Expectations and hopes/fears about the role and/or training

- Project overview – remit of the project

- Information about client group(s) & working with different groups of people

- **Break**

- What is mentoring?

- Confidentiality

- Listening & communication skills

- Requirements of the role

- Limits and boundaries of the role

- Safeguarding

- Support & supervision

- Evaluation of training

- Next steps

Appendix 4: Matching guidelines

1. **Client preference and needs**
   Has the client expressed a preference in relation to their potential matched volunteer in terms of age, gender, ethnicity, interests etc.? Is the preference appropriate, i.e. does not arise from an ulterior motive or personal prejudice?

2. **Volunteer preferences**
   Has the volunteer expressed a preference? Some people may find some issues too challenging (e.g. if the client had been a perpetrator of domestic abuse and the Peer Mentor has personal experience of this). Is the volunteer confident in working with the client's needs? Ensure that any preferences expressed, are in keeping with the philosophy of the service and not as a result of personal prejudice.

3. **Accessibility issues**
   Do clients or volunteers have any special needs e.g. clients with high mobility needs may have difficulties in travelling and will need to be matched with a volunteer who can travel to them? Is the volunteer confident working with the client's needs? Ask the client and/or volunteer what can be done to assist them. What specific adaptations will need to be made for clients and volunteers?

4. **Location**
   Consider the location of volunteers and clients. Is matching likely to be restricted by geographical area or rural location? Is the volunteer willing to travel? The cost element of extensive travel will also need to be considered. Can it be managed within the project budget?

5. **Experience and skills**
   Does the volunteer have experience and skills that the client could benefit from, e.g. work experience that the client has expressed an interest in taking part or relevant skills?

6. **Background**
   Does the volunteer share similar background or experience with the client e.g. experience of homelessness, unemployment, offending. Do they have a shared experience of other countries and cultures, class background?

6 **Interests/hobbies**
   Does the volunteer share similar interests with the client, e.g. leisure activities, current affairs, music?

When the above points have been considered the project may wish to provide volunteers and clients with the opportunity to meet informally to share information about themselves. Feedback from both parties and any preferences that may arise from this face-to-face contact can then be considered by the Co-ordinator as part of the overall matching process.

Appendix 5: Mentoring Agreement

The purpose of this agreement is to clarify the roles and responsibilities of both the Peer Mentor and client. By voluntarily entering into this relationship, we agree:

1. To agree to contact with each other between meetings by telephone/email/text/through the project (delete as appropriate)
2. To meet in a public place (e.g. cafe/Town/Library), not at our home addresses
3. To contact the Project Co-ordinator if either of us feel the relationship is not working
4. Not to attend the meetings under the influence of drugs/alcohol
5. Not to give or accept money or gifts from each other

As a Peer Mentor, my responsibilities are:

To work with you to identify goals and actions needed to progress and support your needs

- To give focus, encouragement and support to help you to achieve your goals
- To maintain regular contact in line with project guidelines
- To provide support and guidance in a friendly, non-judgemental manner that means you are able to make your own decisions and I will respect the decisions you make
- To act in your best interests at all times, pointing out opportunities as well as potential difficulties
- To seek help from the project if you have a problem that is beyond my experience and/or expertise
- To update the project co-ordinator on the progress of the mentoring relationship
- To keep the content of the meetings confidential, unless otherwise agreed with you or if information needs to be shared, for example if I had concerns about your safety or someone else's
- To be honest and provide constructive feedback to you in a supportive way

Peer Mentor's name: _____

Signed: _____ Date: _____

As a client of the project, my responsibilities are:

- To work with my Peer Mentor to identify goals and ways to achieve them with their support (as well as any other support that may be available)
- To work with my Peer Mentor to produce an action plan or development plan
- To keep my Peer Mentor and the project informed of any changes in my contact details
- To be open to feedback from my Peer Mentor and be honest with them about how I am finding the support

Client's name: _____

Signed: _____ Date _____

Appendix 6: My Action Plan

Area	What you want to change and your goals	Actions for me	Actions for Mentor	To review by (insert date)
Education	I want to complete my English Level 2 course	To find information where I can study this	To help me to find information	In 8 weeks
Work Related Activity	I want to volunteer with children	To think about where I might like to volunteer	To help me to research places and meet with Volunteer Centre	In 4 weeks
	I want to build up my confidence with application forms and interviews	To work with MOTW to source employability courses/support	To provide emotional support to meet with MOTW	In 4 weeks
Social and Leisure	I want to make some new friends who understand some of the difficulties I have with my diabetes	To look at community groups that offer this support	To help me explore this	In 4 weeks
Physical Health	I want to join a walking group to help improve my fitness and reduce my symptoms of diabetes	To look at walking groups in the area, close to where I live	To help me explore ideas for both of these actions	In 8 weeks
	I want to find out about options for weight loss to work out which one suits me best	To book in a time with my Mentor to look at ideas for this	As above	
Emotional Health and Wellbeing	I feel low at times because I hardly see anyone. I would like to feel more confident		To help me explore ideas for Confidence Courses/wellbeing	In 4 weeks
Signposting and Advice	I am having some problems with my benefits at the moment and need some advice about Universal Credits	Agreement to a referral for support from Welfare Rights/similar	To support with a referral to Welfare Rights	In 2 weeks

NB: The timescales are decided with the client and dependent on what is their priority at the moment. In this example the client has identified their Benefits as the priority issue.

Appendix 7: Boundary Guidelines

Personal

- See the person not the behaviour
- Maintain your respect for the other person even when they choose not to follow what you believe to be the best course of action
- Follow what you believe to be the best course of action only if it fits within the project rules
- If a match (between Peer Mentor and client) is unsuitable then avoid taking it personally

Emotional

- Try to understand the other person's thoughts and feelings
- Remember, you may not understand a situation when you see only part of it
- Even if you have had a similar problem, you may not fully understand the other person's difficulties
- Everyone has different ways of coping. Your way of coping may not be right for another person

Organisational

- It is your right to ask what the project does to maintain its boundaries and if they are consistent with the project's expectations of volunteers
- It is your responsibility to maintain contact with the project
- It is both your right and your responsibility to accept support in your role as a volunteer

Do

- Be aware of your own personal boundaries
- Avoid getting into situations that could be misinterpreted
- Think before you say 'yes'
- Remember that the main focus of the relationship is the needs and progress of the person you are there to support

Don't

- Give out your home telephone number/ address
- Take the other person to your own home
- Get involved in a sexual relationship
- Get emotionally over-involved
- Give or lend money to the other person

If you are ever in doubt about a boundary issue speak to a project worker about it

Appendix 8: Supervision template

Name of supervisor: _____

Name of volunteer: _____

Date of supervision: _____

1. How are you getting on with your client?

2. What targets/objectives have been agreed with the client?

3. Progress made by client(s) since the last supervision meeting?

4. Any issues/problems arisen since the last supervision meeting?

5. Additional support/training required?

6. Summary of action points

7. Date and time of next meeting

Appendix 9: Data collection template

Name of project					
Project year					
Completed by					
About your volunteers	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**	**Total at year end**
Total number of volunteers					
Number of new volunteers					
Number of active volunteers					
Numbers leaving project					
Numbers awaiting training					
Number of evaluations received					
About your clients	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**	**Total at year end**
Total number of clients					
Number of new clients					
Numbers waiting to be matched					
Number of relationships ended					
Number of evaluations received					
Additional statistics	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**	**Total at year end**
Number of self-referrals received					
Number of referrals via other agencies					
Number of new enquiries					
Numbers signposted to other services					
Additional information					

Other services clients were signposted to:

Other key external contacts made this year