NORTH CAROLINA
CERTIFIED PEER SUPPORT SPECIALIST PROGRAM

# Course Submission and Evaluation Guidelines (CSEG) Tool

**Behavioral Health Springboard (BHS)**
**School of Social Work**
**The University of North Carolina – Chapel Hill**

## Introduction

This Course Submission and Evaluation Guidelines (CSEG) Tool is designed to support the assessment of the North Carolina Certified Peer Support Specialist (NCCPSS) Instructor's training materials presented to the Behavioral Health Springboard (BHS) and North Carolina Division of Mental Health Developmental Disabilities and Substance Use Services (NC DMH/DD/SUS) for review. The course developer/owner must show that their training focuses on the skills and knowledge required of PSS as established by a January 2007 role delineation study. Only graduates of training programs of a course currently approved through this process are eligible to apply for certification as a CPSS by NC DMH/DD/SAS. The course standards are rigorous and reflective of the most current evidence-based practices. The PSS course evaluation materials are firm but not unyielding; they will be modified in future years to reflect new research and scholarship. The PSS course review process assesses whether the Instructor's Manual:

a) Addresses **ALL** the core concepts and identifies where in the Instructor's Manual each core competency is taught;
b) Provides specifics on what will be taught (content) to meet the core competency and how the content will be taught; and
c) Provides the necessary teaching materials.

**ALL competencies must be addressed in the Instructor's Manual.**

The choice of teaching methods used in the course is not being evaluated. Different situations require different methods, and Course Developers will have different models of how people learn and how to teach the required content. However, we are evaluating that there is a specified teaching method(s).

## How to Use this Document

This evaluation document is designed to help the evaluator of the Instructor's Manual establish whether the developers of the training program have identified and met the core content set for the NCCPSS Program.

**For Course Developers**

Course Developers are required to use this document to specify by page and paragraph:
- The precise locations of the content (i.e., including all content, PowerPoint slides, and handouts ) that teach a particular core concept.
- Instructions or specifics on how the content for each core competency will be taught (teaching methods). **Teaching methods must precede or align with the content.**
- If the core concept states to "demonstrate," then the reviewers will be assessing whether the course includes exercises in which participants practice in a role-play or if interactive activities are evident in the teaching methods
- Course Developers, please note the following:

- o It is important to include information and instructions on the concept of wellness versus illness identity as delineated in multiple core concepts.
- o Domain 1 addresses the PSS's personal wellness and not the wellness of the person being served.
- o Only the information specified will be considered by evaluators in the review.
- **Course providers must also complete page 3, The Submission Checklist.**

The core concepts are described under **NINE** broad domains and are not listed in any order; there is no expectation that core concept 1A will be taught before 1B.

**For Reviewers:**
For each core concept, reviewers assess whether there is sufficient evidence (content) in the Instructor's Manual being reviewed that meets the standard for each core concept by:
   a. Providing sufficient materials to teach each core competency;
   b. Including instructions to the trainer on how to teach each core concept (teaching methods).

Each course is evaluated by three reviewers, two primary and an administrator. If there is uncertainty about whether a core standard has been met or a disagreement between the primary evaluators, the administrative evaluator will assist in resolving any difference(s).

While content standards are provided to enable a wide variety of courses to be developed to meet situational needs, for a course to be successfully approved, **ALL core content standards must be addressed within the Instructor's Manual.**

All core content standards require specification of the teaching method(s) to be used, but no single teaching method is defined as appropriate.

**Each evaluator must also complete page 4, the *Summary Evaluation page*.**

*All forms must be completed, including the submission checklist, before the course will be submitted for review.*

**All forms requesting information must be completed at course submission**
**Submission Information & Checklist**

| | |
|---|---|
| **Course Title or Name:** | |
| **Training Hours:** | |
| **Course Developer:** | |
| **Address:** | |
| **State & Zip Code:** | |
| **Contact Name:** | |
| **Phone:** | |
| **Email:** | |
| **Date Submitted:** | |
| **Signature of Course Developers or Contact:** | |

**The Course Developer must provide an electronic copy of the Instructor's Manual and additional materials (<u>PowerPoints, slide presentation,</u> and <u>daily agenda, etc.</u>) to the NCCPSS Program at [pssregistry@unc.edu](mailto:pssregistry@unc.edu)**

| Item to Submit | Electronic Copy |
|---|---|
| **Course Submission and Evaluation Guidelines (CSEG) Tool** | |
| **Course Instructor Manual** | |
| **Course Participant Manual** | |
| **Course Daily Agenda (must add up to 50 hours)** | |
| **Training of Trainer (TOT) Manual** | |
| **Other Training Materials (PowerPoint Slides, Handouts, Pre-work, Homework, etc.)** | |

**Summary Evaluation**

**Review Date:** _____

**Reviewers Names:**                              **Signatures:**

_____              _____

_____              _____

_____              _____

**Review Team Overall Rating:**

| Approved | Needs Modification |
|---|---|
|  |  |

If you (the evaluator) did not approve the course, did you provide evidence of what parts need modification?

[ ] Yes          No [ ]

**Evaluator Summary Comments:** For courses needing modification, please provide a summary of the areas that need improvement or why you did not approve the course.

**This course review document assesses whether the Instructor's manual clearly illustrates if the core concept is covered and how PSS will be taught. Please check pages one and two to see how a course provider or evaluator should use this document.**

Note: Teaching Methods MUST precede or align with content.

**Example Page: Complete Columns 3 and 5 ONLY**

| Domain X | How to submit a course using the matrix.<br>Y= Yes "Approved"<br>N= No "Not Approved" | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | Course Developer:<br>Where in the Instructor's manual is this core concept addressed?<br>(Page and Paragraph) | Course Reviewer:<br>Does the content teach the core concept?<br>(Y/N) | Course Developer:<br>Where in the Instructor's manual is the Teaching method(s) specified?<br>(Page and Paragraph) | Course Reviewer:<br>Does the Teaching Method teach the cited content?<br>(Y/N) | Course Reviewer:<br>Comments |
| XA | Example 1 | Page 2, 2$^{nd}$ – 4$^{th}$ Paragraphs<br>Page 215 -217, starting at paragraph 4 on 215 and ending at paragraph 1 on page 217. Slide 26, handout 5, | | Page 1<br>(Entire page)<br>Page 214 | | |
| XB | Example 2 | Page 13, # 2 & 3<br>Page 20, bullet point 15.<br>Page 32 # 4.<br>Handout # 5, page 263 | | Page 12, A, B, & E.<br>Page 19, A & B<br>Page 31, See trainer instructions on page 31, which include handout # 5 and page 263 | | |

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**This course review document assesses whether the Instructor's manual clearly illustrates how PSS will be taught. Please check pages one and two to see how a course provider or evaluator should use this document. Complete Columns 3 and 5 ONLY.**

Note: Teaching Methods MUST precede or align with content.

| Domain: 1 | Commitment to Personal Recovery: PSS demonstrate a commitment to _their own personal recovery_ by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? **(Y/N)** | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? **(Y/N)** | Course Reviewer: Comments |
| 1A | Understand the concepts of **personal wellness** and how these concepts apply to the PSS. | | | | | |
| 1B | Understand the reasons for, and methods used, to self-monitor their own wellness. | | | | | |
| 1C | Can define and demonstrate how to communicate (written, verbal, etc.) to **the right people** (e.g., supervisor, sponsor, etc.) when issues of personal wellness interfere with the PSS's ability to do their job. | | | | | |
| 1D | Can define and use person-first recovery language at all times to support **personal recovery** and **empowerment.** | | | | | |
| 1E | Can show an understanding of how the PSS's personal wellness impacts **agency standing** in the community. | | | | | |
| 1F | Know the effect of their **personal limits** on their own wellness, and **how to maintain** their personal wellness. | | | | | |

| Domain: 2 | Relationship Building: PSS demonstrate an understanding of the concepts necessary to develop and maintain healthy relationships with the people they serve, within the agency they work in, other agencies, and their community, by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | **Course Reviewer:** Does the content teach the core concept? (Y/N) | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | **Course Reviewer:** Does the Teaching Method teach the cited content? (Y/N) | **Course Reviewer:** Comments |
| 2A | Understands how to **develop** and **maintain** trust and the importance of being trustworthy. | | | | | |
| 2B | Understands the possible **consequences** of the **impact of failure** to maintain trust. | | | | | |
| 2C | Understand and can demonstrate the ability to **listen empathetically** without **judgment** and accept the individual as they are right now. | | | | | |
| 2D | **Understand** and can **demonstrate** the importance of clear verbal and nonverbal communication skills and how **different situations** may require different communication skills. | | | | | |
| 2E | **Understand** and can **demonstrate** the process of **active listening**, especially the use of open-ended questions. | | | | | |
| 2F | Support the development and maintenance of **community-wide regard** for individuals served, and PSS can always define and use **person-first recovery-oriented** | | | | | |

| | language. | | | | | |
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| 2G | Understand and can demonstrate the importance of developing and maintaining **mutual respect and genuineness** in building personal connections. | | | | | |
| 2H | Understand and can demonstrate the importance of developing, maintaining, and practicing **unconditional positive regard** in building personal connections. | | | | | |
| 2I | Understands **when** and **how** to share their personal experience and when to listen to offer hope and acceptance. | | | | | |
| 2J | Understands the importance of **sitting comfortably in silence** to offer hope and acceptance in recovery. | | | | | |
| 2K | Understand the importance of being able to practice unconditional positive regard at all times. | | | | | |
| 2L | Can communicate with the person served, coworkers, community members, etc., the importance and creation of a **wellness identity** by stripping away the old **"illness identity"** through **open sharing and challenging viewpoints.** | | | | | |
| 2M | Can define and communicate **alternatives** to prevent hospitalization and to support individuals served in the community whenever possible. | | | | | |
| 2N | Can promote a recovery environment in the community, including home and the workplace. | | | | | |

| Domain: | Peer Support Interaction: | | | | | |
|---|---|---|---|---|---|---|
| **3** | **PSS demonstrate an understanding of the concepts necessary to support the people they serve by showing that they:** | | | | | |
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? **(Y/N)** | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? **(Y/N)** | Course Reviewer: Comments |
| 3A | Can define and demonstrate outreach and engagement skills with individuals served, being aware of issues such as gender, culture, etc., to begin building a **professional peer** relationship. | | | | | |
| 3B | Can demonstrate skills to support the individual served to develop a wellness identity to support the person's goals and dreams. | | | | | |
| 3C | Understand their role as a PSS and the role of others in accordance with a variety of plans to support the individual served during a crisis. | | | | | |
| 3D | Can define, model, and mentor recovery values, attitudes, beliefs, and personal actions to encourage wellness and resilience for the person's served. | | | | | |

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| 3E | Can explore with the person's served, the importance and creation of a wellness identity full of potential and possible futures by stripping away the old "illness identity" through **open sharing** and **challenging viewpoints.** | | | | | |
| 3F | Can promote an individual's opportunity for personal growth by identifying teachable moments for building relationship skills to empower the individual and enhance personal responsibility. | | | | | |
| 3G | Understand, model, and share, a **variety** of decision-making tools to encourage a person's ability to make informed choices. | | | | | |
| 3H | Can assist the person's served to re-establish themselves as a valued member of the community by providing examples of healthy social interactions and facilitating familiarity with and connection to the local community. | | | | | |
| 3I | Understand and explore with the person served how to navigate reentry from long-term hospitalization, incarceration, or other congregate living situations that have left the peer with few or no natural supports or connections in the community (Daily Living Skills or other independence deficits, issues with guardianship, housing or employment challenges, etc.) | | | | | |
| 3J | Can discuss what is and is not peer support and how it is different from other therapeutic professional relationships with person's served, team members, and the wider community. | | | | | |
| 3K | Can define "mutuality" and understand the importance of maintaining mutuality in their relationship with peers served. | | | | | |

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| 3L | Can provide examples of how mutuality in a peer relationship can prevent or dispel power differentials and allow the opportunity to enhance the peer relationship. | | | | | |
| 3M | Understand the importance of discussing, documenting, and continuously defining obligations around "safety" and "support" with the person served. | | | | | |
| 3N | Understand the importance of discussing, documenting, and continuously defining what constitutes support with the person served. | | | | | |
| 3O | Can build and preserve the professional peer relationship by exploring what has worked and not worked in the past to identify effective peer support interactions. | | | | | |
| 3P | Understand the importance of the PSS being present with the person, including the ability to sit with discomfort and staying in their role as a peer when confronted with a person's ability to feel safe. | | | | | |
| 3Q | Can recognize and appropriately respond to emergencies, including **physical** and **behavioral** health crisis. | | | | | |
| 3R | Understand the importance of being knowledgeable and following an employer's emergency response procedure. | | | | | |
| 3S | Understand the importance of PSS working and behaving in ways that make them appear competent, reliable, and respectful (professional). | | | | | |

| Domain: 4 | Systems Competencies: PSS demonstrate an understanding of the concepts necessary to support the people they serve and the agency they work in, by showing they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? **(Y/N)** | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? **(Y/N)** | Course Reviewer: Comments |
| 4A | Have a basic knowledge of the history, including N.C. history, of the Mental Health and Substance Use Disorder Consumer/ Survivor Movement and its relationship to social justice to include, at a minimum: Civil Rights Movement; Olmstead Decision; Americans with Disabilities Act; Rehabilitation Act of 1973; Deinstitutionalization; M.H. Parity and Addiction Equity Act; history of peer support; N.C. Department Of Justice settlement 2012; Eugenics/Sterilization; The Vermont longitudinal study of persons with mental illness. | | | | | |
| 4B | Support the individual in navigating systems (medical, social services, legal, etc.) through activities such as: accompanying them to places; coaching on court protocol; promoting timely appearance, proper dress, behavior, and speech for each unique setting. | | | | | |
| 4C | Understand the process of working with their team/co-workers/ supervisor to support individuals who need to be **referred** to other resources and services. | | | | | |

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| 4D | Understand the importance of being able to support each individual in accessing community resources by facilitating familiarity and connection to the local community to **achieve desired integration**. | | | | | |
| 4E | Can promote self-advocacy by facilitating each individual's education about their human and legal rights. | | | | | |
| 4F | Understand the importance of empowering an individual by supporting the person to exercise their human and legal rights. | | | | | |
| 4G | Understand the importance of job responsibilities defined within an agency. | | | | | |
| 4H | Understand the reasons for adhering to agency policy, procedures, and code of conduct. | | | | | |
| 4I | Can provide complete, accurate, and timely documentation in recovery-oriented language for all services provided in a manner consistent with agency, state, and federal requirements to obtain compensation, maintain medical records, and demonstrate quality of care. | | | | | |
| 4J | Understand the critical importance of maintaining, securing, and keeping confidential personal medical information and records in adherence to federal, state, and local laws, rules, and regulations (HIPAA, CFR 42). | | | | | |
| 4K | Can report pertinent observations and events per their role as a PSS and agency/team requirements to improve service delivery and help the individual achieve their goals. | | | | | |

| Domain: 5 | Ethics and Boundaries: PSS demonstrate application of the *North Carolina Certified Peer Support Specialist Code of Ethics* in everyday activities by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | **Course Reviewer:** Does the content teach the core concept? **(Y/N)** | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | **Course Reviewer:** Does the Teaching Method teach the cited content? **(Y/N)** | **Course Reviewer:** Comments |
| 5A | Understand legal responsibilities around mandatory reporting of abuse and neglect of children, adults with disabilities and older adults, etc.). | | | | | |
| 5B | Understand and can apply ethical decision-making around boundaries or limits of the PSS relationship with others (i.e., colleagues, parents and family members, people served, etc.) | | | | | |
| 5C | Understand and can apply the NC PSS code of ethics to decision-making and boundaries and limits of PSS relationship with others. | | | | | |
| 5D | Understand their role in supporting the choices of persons served, i.e., PSS is not acting coercively. | | | | | |

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| Domain: 6 | Substance Use Disorders: PSS demonstrate an understanding of the concept of addiction as a disease vs. moral failure by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | **Course Developer:** Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? **(Y/N)** | **Course Developer:** Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? **(Y/N)** | Course Reviewer: Comments |
| 6A | Understand that there are many paths to recovery and resilience and can identify examples. | | | | | |
| 6B | Understand return to use (formerly referred to as "relapse") can be a component of recovery and maybe a stage in the change process. | | | | | |
| 6C | Can assist in planning for prevention of return to use and a renewed commitment to wellness. | | | | | |
| 6D | Understand the importance of reassuring the person served of their ongoing commitment to support them non-judgmentally if "return to use" occurs. | | | | | |
| 6E | Have knowledge of the prevalence of co-occurring substance use disorders and mental health challenges. | | | | | |

| Domain: 7 | Trauma-Informed Practice: PSS demonstrate an appreciation for the role and influence of trauma on behavioral health by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | Course Developer: Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? (Y/N) | Course Developer: Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? (Y/N) | Course Reviewer: Comments |
| 7A | Can define trauma and identify possible sources of and coping mechanisms associated with trauma (e.g., fight, flight, or freeze). | | | | | |
| 7B | Understand that people react differently to the same trauma. | | | | | |
| 7C | Can recognize short- and long-term effects of trauma (e.g., Adverse Childhood Experiences Study findings). | | | | | |
| 7D | Understand and discuss strategies to guard against secondary (vicarious) trauma and compassion fatigue. | | | | | |
| 7E | Understand that trauma and healing can be affected by cultural differences, including race and ethnicity, **gender identity, sexual orientation**, age, language, and family history. | | | | | |
| 7F | Understand and discuss how experiences within various systems may have traumatized the person served (e.g., experiences within the Substance Use or Mental Health Treatment systems of care. Experiences with law enforcement and/or the judicial system) | | | | | |

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| 7G | Understand the following six guiding principles of trauma-informed care as developed by the CDC and SAMHSA.<br>• Safety<br>• Trustworthiness & transparency.<br>• Peer support.<br>• Collaboration & mutuality.<br>• Empowerment & choice.<br>• Cultural, historical & gender issues | | | | | |
|---|---|---|---|---|---|---|
| 7H | Understand the prevalence of Traumatic Brain Injury, Acute Trauma, and Post-Traumatic Stress Disorder. | | | | | |
| 7I | Understand how Traumatic Brain Injury, Acute Trauma, and Post-Traumatic Stress Disorder impacts mental health challenges and substance use disorders. | | | | | |

| Domain: 8 | In Support of Service Members and Families: PSS demonstrate an understanding of the military as a unique culture with different subcultures by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | Course Developer: Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? (Y/N) | Course Developer: Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? (Y/N) | Course Reviewer: Comments |
| 8A | Recognize and can address the stigma associated with having behavioral health challenges in the military. | | | | | |
| 8B | Understand how to navigate resources available specifically for military members and their families. | | | | | |

| Domain: 9 | Cultural Competence/Awareness: PSS demonstrate a respect for cultural differences and can cultivate successful approaches to diversity by showing that they: | | | | | |
|---|---|---|---|---|---|---|
| | Core Concept | Course Developer: Where in the Instructor's manual is this core concept addressed? (Page and Paragraph) | Course Reviewer: Does the content teach the core concept? (Y/N) | Course Developer: Where in the Instructor's manual is the Teaching method(s) specified? (Page and Paragraph) | Course Reviewer: Does the Teaching Method teach the cited content? (Y/N) | Course Reviewer: Comments |
| 9A | Understand the need to continue improving their awareness of self and their value systems. | | | | | |
| 9B | Have knowledge of strategies to recognize and address one's own implicit bias. | | | | | |
| 9C | Understand unstated institutional and cultural norms in workplaces, communities, and society and how those norms lead to inequities. | | | | | |
| 9D | Maintain a working knowledge of diverse individuals' and community's history, culture, beliefs, values, and needs. | | | | | |