

THE COMPASS

INITIATIVE

Handbook for Peer Specialist Certification
CORE and MHPS Trainings

Table of Contents

Topic	Page Number
Who are we: Vision, Mission, and Values	3
Peer Support: Background and Introduction	3
Certification Types	5
Qualifications	5
Steps for Application, Training, and Certification	6
Registration Fees	7
Diversity, Equity, Inclusion, and Accessibility	7
Attendance	8
Overview of Curriculum: CORE and Peer Specialist	8
Mental Health Peer Specialist Curriculum & Daily Schedule	9
Knowledge Assessment	10
Classroom Rules and Etiquette	10
Continuing Education Opportunities	10
Disclosures, Complaints, and Sanctions	10

Appendixes

Letter	Page Number	Item Name	Action Required
A	12	“How to” flow chart	
B	13	Peer Specialist Code of Ethics	Sign, Date, and Return
C	15	Self-Attestation	Sign, Date, and Return

About The Compass Initiative (TCI)

Who are we?

The Compass Initiative grew out of the belief that we all lose our way sometimes. Taking the wrong course could in fact lead you to your greater purpose in life and most importantly you have the power to change direction yourself. You are your compass. You are choosing your path, forging your freedom, empowering your cause, and living fully the way you deserve.

Our Vision:

To inspire through innovative education the full potential of each person and their dreams.

Our Mission:

To create a learning atmosphere valuing lived experience, collaboration, self-awareness, and communication to nurture the human spirit.

Our Values:

The values we use to shape all training and educational aspects of TCI are: honesty, empowerment, hope, initiative, understanding, choice, trust, ingenuity, passion, respect, diversity, collaboration, leadership, willingness to learn, enthusiasm, and joy.

Background, Introduction, and Roles of Peer Support

Background and Introduction

Peer support workers are people who have been successful in the recovery process and who help others experience similar situations. Through shared understanding, respect, and mutual empowerment, peer support workers help people become and stay engaged in the recovery process, reducing the likelihood of relapsing. Peer support services can effectively extend the reach of treatment beyond the clinical setting into the everyday environment of those seeking a successful, sustained recovery process.

Peer Support Role

Peer support workers engage in a wide range of activities. These include:

- Advocating for people in recovery
- Sharing resources and building skills
- Building community and relationships
- Leading recovery groups
- Mentoring and setting goals

Peer support roles may also extend to the following:

- Providing services and/or training
- Supervising other peer workers
- Developing resources
- Administering programs or agencies
- Educating the public and policymakers

Peer support workers need to develop core competencies to provide services to specific groups who also share common experiences, such as family members. The shared experience of being in recovery from a mental health and/or substance use condition or being a family member is the foundation on which the peer recovery support relationship is built in the behavioral health arena.

What do they do?

The role of the peer support worker has been defined as “offering and receiving help, based on shared understanding, respect and mutual empowerment between people in similar situations.” Peer support has been described as “a system of giving and receiving help” based on key principles that include “shared responsibility, and mutual agreement of what is helpful.”

Peer support workers engage in a wide range of activities, including advocacy, linkage to resources, sharing of experience, community and relationship building, group facilitation, skill building, mentoring, goal setting, and more. They may also plan and develop groups, services or activities, supervise other peer workers, provide training, gather information on resources, administer programs or agencies, educate the public and policymakers, and work to raise awareness.

Peer support services are programs, discussions, events, groups, etcetera within mental health domains that are directed by individuals and groups in recovery and are based upon the philosophy of peer support. They typically take place within the structure of an agency or organization and are provided as a service by a trained peer specialist. During the Texas 85th Legislative session House Bill 1486 (Peer Specialist Services) was passed into law. As a result of the implementation of House Bill 1486.

Texas Certification Board serves as the certifying body for Peer Specialists and Peer Supervisors. The Compass Initiative provides training for Mental Health Peer Support Specialists and Peer Support Supervisors. This means that there are steps that must be completed in a certain order to become certified. The first step is to enroll and complete the Approved Training for Peer Specialists. Once you have completed the training and received your training certificate, then you can apply for Certification through the Texas Certification Board. They are the only people who are allowed to Certify Peer Specialists in the state of Texas. More information on this topic will be provided later when we go over the steps in detail.

Certification Types

Peer certifications are typically developed and implemented based upon the lived experiences of the peer-worker and the people they serve. These include:

- Mental Health Peer Certifications are for peer workers with lived experience involving a mental health condition.
- Peer Support Certification Substance Use Peer Certifications are for peer workers with lived experience involving a substance use condition.
- Family Peer Certifications are for peer workers with lived experience as the primary caregiver of a current or former dependent with a mental health and/or substance use condition.

It is also important to note that some states and their corresponding certification entities may effectively utilize the same certification process for more than one type of certification. Combining mental health and substance use lived experiences, these certifications are typically referred to as “integrated.” As noted above, varying subtypes of specialized peer workers with unique lived experiences are also integral constituents of the peer workforce. For example, justice-involved individuals, older adults, unhoused populations, veterans, and people living with a physical health condition or disability.

Once an individual becomes a Mental Health Peer Specialist, as in other professions, they are expected to attend additional training to maintain their certification. TCI offers continuing education classes to assist in fulfilling this requirement. Additionally, each graduate from our program is encouraged to attend our monthly alumni meeting where they can connect with other peers, staff concerns, share resources, and continue their peer learning. The Alumni group is held monthly on the third Thursday of the month at 6pm via Zoom. Once the Peer has graduated from the training, TCI will email the details about the group and a welcome letter.

Qualifications

Individuals are encouraged to work or volunteer as a peer specialist prior to applying to attend the certification training. The selection criteria described below for applications to the specialized training includes an individual’s prior experience providing peer support services. To be eligible to attend the Peer Specialist training, an individual must:

- Be 18 years of age or older.
- Be a high school graduate or have completed a G.E.D.
- Self-identify as a person who has direct personal experience living in recovery from mental health challenges.
- When applying for MHPS training, have a primary diagnosis of a mental health condition or dual diagnosis, which significantly disrupted one’s life.
- Have significant experience addressing their own recovery and an ability to manage their own wellness.

- Desire to utilize their experiences to assist others with their recovery.
- Be willing to publicly identify as a person living in recovery for the purpose of educating, role modeling, and providing hope to others about the reality of recovery.

Steps for the Application, Training, and Certification Process

Summary of the steps for this new training and certification process. You must complete each step to be eligible for certification. Appendix A displays a flowchart for clarity.

Step 1: Complete the application online and submit payment online in the amount of \$50. This will allow you to sign up for CORE. This training will be discussed later in the document.

Step 2: Complete, sign and return all three Appendices with your application. They are required prior to the start of your CORE. The CORE training is a **twenty hour** interactive webinar held once a month. You must register at least one week prior to the next scheduled training. Once your application and payment are received, you will be forwarded an email with instructions for logging onto the training. At the completion of CORE there is a short knowledge assessment. Once you complete and pass the assessment you will be able to apply for Peer Specialist training.

Step 3: Upon completion of CORE, if you are still interested in becoming a Peer Specialist you can look for the next training dates listed on our website. The training is a five day, 40-hour, classroom style training held in various locations as well as on Zoom in order to allow access for people who live in rural areas to attend.

Training to become a Peer Specialist is a competitive process and this will be explained in the next section. Should you become accepted, you will be forwarded with an invoice for payment by credit card and information about the training. Then you will need to attend the training in full and obtain a training certificate.

Step 4: Upon completion of the Peer Specialist training, you will take a knowledge assessment on the last day of class. Once you complete and successfully pass the knowledge assessment you will receive instructions for downloading and printing confirmation that you have successfully completed all the steps in the training process. This document is what you need to apply for your certification through the Texas Certification Board in Texas.

Step 5: After you have received your training certificate, refer to the Texas Certification Board website for information on how to apply, what documentation is required, as well as the cost (<https://www.tcbap.org/>). The initial certification is valid for **six months**. During this time, you must complete **250 hours** of supervised work experience. You may then apply for re-certification for a full two-year certification period.

Application:

If you are interested in applying to attend the CORE or MHPS training you can see the dates on the TCI webpage www.thecompassinitiative.com or simply hit the **CONTACT US** button on the

page and a team member will reach out to you with additional information and application guidelines.

Scoring System for Applications:

Enrollment in the specialized training is limited to a maximum class size of fifteen participants to maintain a comfortable learning environment. If we receive significantly more applications than there is space for each training, then a scoring rubric is used to objectively review and rank applications. If needed, a waitlist will be created to ensure all those who want to attend training have an opportunity.

The scoring rubric considers factors such as: prior employment or volunteer experience as a peer specialist; understanding of the role of a peer specialist, and how an applicant can speak to a series of questions about the individual's recovery experience and prior training.

Registration Fees:

There are registration fees for the core training and for the specialized training which cover the administrative time required to coordinate the training, the cost of the trainers, the printed materials, and lunch provided as part of training. The 20-hour Core training is \$200 and the MHPS supplemental training is \$600. If an individual is accepted for the training, they are sent an invoice which must be paid (by the individual or their employer) prior to the start of training. Payments are made by credit card through The Compass Initiative website. Individuals, groups, organizations or their employers are responsible for arranging and funding their training before training begins.

Reasonable Accommodations:

All training courses are held in handicapped accessible locations. Should an individual require reasonable accommodation to ensure successful training experience, they indicate that on their application and The Compass Initiative makes every effort to provide that accommodation.

Training in Prevalent Languages:

We offer our training in English; however, we have partnerships with other agencies that can give the training in Spanish as needed.

Diversity, Equity, Inclusion, and Accessibility

At The Compass Initiative, we're on a mission to change the world for the better through education, training, and mentorship. Central to our mission is the belief that diversity and inclusion are catalysts for meaningful change. Our commitment to diversity is woven into the very fabric of our organization, from our leadership to our clients. Together, we're making strides toward a more inclusive society where everyone's rights are protected, and everyone's voice is heard. We want to bring out the best in our team members by creating a sense of belonging,

being a place where they can grow, and ensuring everyone feels valued, heard, and supported so we can mentor and guide others on the same path.

Attendance

Before attending the training, all participants are required to complete the CORE and sign all required documentation. On the first day of class you will be given your Training Manual, which contains independent study learning modules and a set of reflective questions.

Attending all five days of the training with no absences from the training room (see note below). Actively participate in discussions and role plays. Complete all homework assignments. Individuals who do not meet these criteria are not eligible to take the knowledge assessment. (Note: We expect participants to be present for the entirety of the training.)

However, we recognize that important issues may arise that require participants to miss a portion of the training, which is why a participant may have the opportunity to miss a small portion of the training without being disqualified from taking the knowledge assessment. However, if a participant needs to be absent, they must communicate with both The Compass Initiative and the trainers present.

Should a participant miss any portion of the training without prior approval from the trainers or The Compass Initiative, they may lose their ability to take the knowledge assessment. Furthermore, if an individual misses more than four hours of training in total, they will not be eligible to complete the knowledge assessment at the conclusion of the training week. Training commences from **9:00 AM until 5:00 PM Monday through Friday afternoon**. The knowledge assessment is administered at the end of training and is an open book.

Lunch and breaks are provided each day. The training is provided in a relaxed, casual setting. However, this is training for employment in the workplace. Participants are expected to dress in casual but appropriate attire. No additional supplies are needed for the training; all course materials are supplied.

Overview of the Curriculum: CORE and MHPS Training

Core Competency Training (CORE) is intended to enable individuals to master the basic competencies necessary to function as an effective peer specialist.

What are Core Competencies? Core Competencies are the capacity to easily perform a role or function. They are often described as clusters of the knowledge, skills, and attitudes a person needs to have to successfully perform a role or job or as the ability to integrate the necessary knowledge, skills, and attitudes.

Core Competencies, principles and values core competencies for peer workers reflect certain foundational principles identified by members of the mental health consumer and substance use disorder recovery communities. These are: recovery-oriented, person-centered, voluntary, relationship-focused, and trauma-informed. Each of these are covered in detail during the 20-hour CORE class.

Mental Health Peer Specialist Curriculum & Daily Schedule:

The MHPS specialized training takes what you have learned in the CORE and builds on each aspect. Think of building a house. The CORE gives you the foundation and the framework to understand peer support. In the specialized training you will learn all the details to make your house livable, the walls, roof, windows, and doors.

Monday:

Module 1	Peer Specialist Orientation
Module 2	The Shoulders Upon Which We Stand
Module 3	Peer Specialist Values and Ethics
Module 4	The Power of Language
Module 5	Five Stages Within the Recovery Process
Module 6	Part 1: What Are My Stories

Tuesday:

Module 6	Stories in Practice
Module 7	Opening the Door to New Perspectives
Module 8	Listening: The Art of Holding Space
Module 9	Group Facilitation and Recovery Dialogues
Module 10	Federal and State Mental Health Systems

Wednesday: Recovery Stories

Module 11	Environment Matters
Module 12	Snippets
Module 13	Promoting Self-Help

Thursday:

Module 14	The Power of Dissatisfaction
Module 15	PICBBA
Module 16	Fear: Friend or Foe
Module 17	Meeting the Whole Person

Friday:

Module 18	Ethics and Boundaries
Module 19	Change Agent
Module 20	Power, Conflict and Integrity
Knowledge Assessment	Review for examination
	Next steps for Certification

Knowledge Assessment

The knowledge assessment is administered at the end of training and is an open book/note. You will be provided with a link to complete the assessment within 72 hours of completing the course. Upon passing the assessment, you will be emailed your MHPS certificate so that you can include it in your MHPS application on Certemy with the Texas Certification Board.

Training Evaluation

Upon completion of the training (for both Core and MHPS) a course evaluation will be emailed to the participant to complete and return so that recommendations and/or feedback can be discussed with the instructors to constantly improve the learning environment for all participants.

Classroom Rules and Etiquette

The Compass Initiative reserves the right to require a participant to exit a training or event early (and consider course participation incomplete) should a participant at a training or event: cause significant disruption (destruction of property, public intoxication, etc.), is disrespectful or rude to trainers, participants, event staff or other community partners, behaves in any manner that violates the Mental Health Peer Specialist Code of Ethics listed in Appendix B (regardless of not yet having been certified), or demonstrates an inability to adhere to recovery oriented behavior.

Inappropriate behavior at any The Compass Initiative training event may result in removal from the training, a temporary or permanent bar from attending our other events, and/or referral to the certifying body of Peer Specialists for a formal ethical violation. Finally, although everyone is responsible for their own recovery, The Compass Initiative expects every participant to be mindful that their fellow participants may have different needs for their recovery and for supporting themselves throughout training or events. In the spirit of the Peer Specialist Core Values, please treat all other participants with respect, mutuality, and authenticity.

Continuing Education

Following the initial six-month certification and completion of the supervised work requirements, individuals apply for recertification. Subsequent certifications are valid for a period of twenty-four months from the date the individual is approved for certification by the certifying body.

During that period the peer specialist is required to acquire a minimum of twenty (20) Continuing Education Units (CEUs) or thirty (30) Professional Development Hours. The Compass Initiative provides several opportunities to earn continuing education units throughout the calendar year. Please refer to our website for more information.

Disclosures

The Compass Initiative training for peer specialists assures peers, families, employers, and the public that individuals trained by us as peer specialists are qualified and competent in a set of educational principles and experiences needed to perform the responsibilities of a Peer Specialist. We have accepted and embraced the following Peer Specialist Code of Ethics (Appendix B) and the Consent, Limits of Confidentiality, and Boundaries (Appendix C) ensure that each peer specialist will conduct themselves to the highest standards of ethical practice.

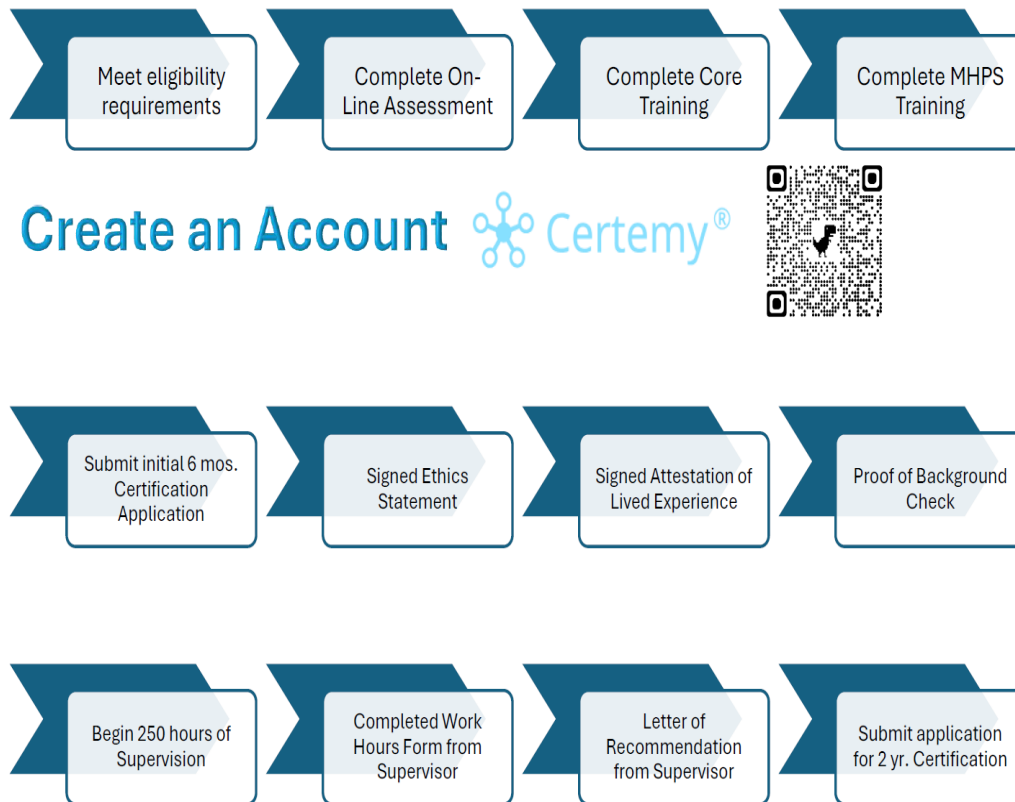
Complaints and Sanctions:

Should an individual believe that a Peer Specialist has violated the Code of Ethics or the Rules of Conduct, they should notify the Peer Specialist's employer and file a complaint with the appropriate certifying body (Texas Certification Board).

Additional Questions, Comments or Concerns.

Should you have additional questions, comments or concerns relating to any information contained in the Peer Specialist Training Manual, please contact The Compass Initiative at DrEly@thecompassinitiative.com.

Appendix A
“How to” Flow Chart



Certemy Website: <https://tcbap.certemy.com/entry/login>

You can create your Certemy account and start working on the steps as soon as you sign up for the Core training. You will need to upload your Core training certificate and the MHPS training certificate (both from TCI) to this website then follow the instructions to gain your certification from the state of Texas.

Appendix B

Mental Health Peer Specialist Code of Ethics	
The principles in the following Code of Ethics guide Texas Mental Health Peer Specialists in their roles, relationships and levels of responsibility in which they function professionally.	
1. The primary responsibility of Mental Health Peer Specialists is to help individuals achieve their own needs, wants, and goals. Mental Health Peer Specialists will be guided by the principle of self-determination for all.	
2. Mental Health Peer Specialists will maintain high standards of personal conduct. Mental Health Peer Specialists will also conduct themselves in a manner that fosters their own recovery.	
3. Mental Health Peer Specialists will openly share their recovery stories, and will likewise be able to identify and describe the supports that promote their recovery.	
4. Mental Health Peer Specialists will, at all times, respect the rights and dignity of those they serve.	
5. Mental Health Peer Specialists will never intimidate, threaten, harass, use undue influence, physical force or verbal abuse, or make unwarranted promises of benefits to the individuals they serve.	
6. Mental Health Peer Specialists will not practice, condone, facilitate or collaborate in any form of discrimination on the basis of ethnicity, race, gender, gender identity, gender expression, sexual orientation, age, religion, national origin, marital status, political belief, mental or physical disability, military status, or any other preference or personal characteristic, condition or state.	
7. Mental Health Peer Specialists will advocate for those they serve that they may make their own decisions in all matters when dealing with other professionals.	
8. Mental Health Peer Specialists will respect the privacy and confidentiality of those they serve.	
9. Mental Health Peer Specialists will advocate for the full integration of individuals into the communities of their choice and will promote the inherent value of these individuals to those communities. Mental Health Peer Specialists will be directed by the knowledge that all individuals have the right to live in the least restrictive and least intrusive environment.	
10. Mental Health Peer Specialists will not enter into dual relationships or commitments that conflict with the interests of those they support.	

11. Mental Health Peer Specialists will not engage in sexual/intimate activities with those to whom they are currently providing support, or have worked with in a professional role in the past two years.
12. Mental Health Peer Specialists will not provide services to another when under the influence of alcohol or when impaired by any substance, whether or not it is prescribed.
13. Mental Health Peer Specialists will keep current with emerging knowledge relevant to recovery, and openly share this knowledge with their colleagues.
14. Mental Health Peer Specialists will not accept gifts of significant value from those they serve.

A peer specialist may not:

<ul style="list-style-type: none"> a. practice psychotherapy, make clinical or diagnostic assessments, or dispense expert opinions; b. engage in any service that requires a license; c. falsify any documentation related to application, training, testing, certification, or services provided under this subchapter; d. retaliate against any person who, in good faith, makes a complaint or files a grievance against the peer specialist regarding services provided under this subchapter; e. engage in conduct that is prohibited by state, federal, or local law, including those laws prohibiting the use, possession, or distribution of drugs or alcohol; f. participate in, condone, or promote discrimination on the basis of race, creed, color, national origin, gender, sexual orientation, religion, age, physical disability, or economic status in the performance of peer specialist services or training; g. delay or fail to report suspicion of abuse or neglect to the proper authority; h. violate law, rule, or policy related to a recipient's privacy and confidentiality; i. violate professional and personal boundaries, including having sexual contact with a recipient; or j. have a dual relationship with a recipient

Printed Name:
Signature
Date:
Trainer Verification and Signature:

Appendix C

Promoting Authenticity Through Self-Attestation

“People with lived experience must be front and center in the creation, development, and adoption of (peer certification) standards—at federal, state, and local levels.”

“Nothing about us without us— centering the lived experience of peers.”

-SAMHSA

Describe any strategies that you used to overcome challenges related to (yours or a child’s/dependent’s) mental health and/or substance use condition.

What strategies do you still use today?

Describe how you utilize your lived experience in assisting others. Describe your lived experience and/or your self-defined recovery or resiliency.

Describe how your lived experience qualifies you as a certified (mental health/ substance use/family) peer worker.
Share your vision of helping others who are experiencing similar challenges.

Printed Name:
Signature
Date:
Trainer Verification and Signature: