Towards a Meaningful Evaluation Framework for Peer Work

Short Report 2023

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This report is dedicated to Ruah Grace - our valued co-conspirator, comrade and friend. Instrumental in the discussions detailed in this report and instrumental in shaping the lives of everyone in the communities she held dear. Ruah is dearly and desperately missed.

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This document was produced in a response of a need for a resource to support meaningful evaluation of Peer Work in mental health sectors.

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CONTEXT

Peer support represents a potential revolution in how communities respond to human distress and has been described as:

> *"Transformative in its rejection of individualistic reductive and pathologising metanarratives of distress that medicalise or psychologise human experience"* (Kemp et al., 2020, p.50).

In Australia, peer workers provide support to individuals, groups, and whole communities in informal community roles or via more formalised and employed positions within consumer operated services, non-governmental organisations, or statutory mental health services (Bradstreet, 2006; Davidson et al., 2006). Peer workers in formalised roles (e.g., hereto referred to as peer work), unlike other healthcare or community workers, openly and purposefully bring to their work knowledge and wisdom gained through lived experience of mental health challenges and/or contact with mental health services (people with a lived/living experience), to establish connections with others (Kemp et al., 2020).

Peer workers meet people in distress as equal partners in a peer relationship, providing opportunity to create meaningful connection through mutual, transparent, and transformative dialogue (Repper & Carter, 2011). This includes dialogue around shared experiences of stigma, discrimination, and human rights violations in the community and health services (Kemp et al., 2020). Peer workers can bridge the gulf between community and service providers to improve healthcare access, and support individuals and communities to explore diverse explanatory frameworks for distress, including relational perspectives, trauma informed, socio-political, and Indigenous conceptualisations (Byrne et al., 2021; Mead, 2010). Emerging evidence suggests that peer work practice benefits individuals and communities in various ways, including reducing hospital admissions, and increasing individuals' social networks, service engagement, cultural connection, and housing, education, and employment opportunities (Davidson et al., 2013; Grey & O'Hagan, 2015; Hancock et al., 2021; Sledge et al., 2011). Peer-to-peer dialogue may also prove to be highly protective against alienation and isolation (Kemp et al., 2020).

Peer Work Evaluation

Evaluation of peer work in community and health service settings is vital, not only to develop knowledge about peer work practice, but also to provide evidence to policy makers and service providers that other forms of practice, which may disrupt dominant frameworks of care, are *possible and effective* for transforming health outcomes for people experiencing distress (Ainsworth et al., 2020; Kemp et al., 2020). However, the current focus on linear outputs and de-contextualised explanations for the efficacy of peer work, or on 'hard' tangible and monetised outcomes, means that most research and evaluation frameworks fail to capture the complexity and nuances of peer work. Additionally, evaluation frameworks tend to treat community members as though they are passive recipients of care, which is not in line with peer workers' commitments to solidarity, mutuality, dialogue, and power-sharing.

Peer workers are, therefore, seeking new ways to evaluate their work that can respond to the complexity and participatory nature of peer work. Meaningful evaluation offers such an approach as it can capture complex, emergent, relational, personal, and unintended outcomes (Zappalà, 2020). It has the potential to provide peer workers with a way of exploring and demonstrating the transformational power of their work to individuals and communities in crisis, as well as to health services, and could be a means of garnering policy support and resources to sustain and extend this work.

This project, which was funded by the Centre for Social Justice and Inclusion and the Faculty of Health, UTS, sought to provide training and skill development in Meaningful Evaluation Frameworks to peer work leaders, and to create a space for a deliberative dialogue about the possibility and value of a peer-specific meaningful evaluation framework. The document, which was developed by peer work leaders and aspiring allies, is intended as a resource for the peer workforce.

PROJECT DESIGN

Project Objectives

This project is a collaboration between peer work leaders, UTS Faculty of Health, and UTS Centre for Social Justice and Inclusion. The project team, which included recognised peer work leaders and aspiring academic allies, sought to address an epistemic injustice (lack of knowledge resources) that impacted on the capacity of peer workers to demonstrate the efficacy and value of their work in the community and health sector. Currently peer workers are expected to evaluate their work within traditional evaluation frameworks, which emphasise linear, de-contextualised, 'hard', and monetised outcomes. While such frameworks provide some utility in advancing knowledge about the value of peer work, they may fail to capture the complexity and transformative power of peer work for individuals and communities. They may also shape peer work practice to suit system logics, and thereby, constrain the transformative power of peer work. Indeed, as Sherry Mead (2023), founder of Intentional Peer Support argues, *"peer support is social change"*, and peer work is often intentionally opposed to maintaining the current status quo in services (Kemp et al., 2020). Arguably, additional ways of evaluating peer work would provide a richer overall picture of peer work in diverse contexts.

Design and Methods

Needs Analysis

This project was initiated in response to a stated need by peer work leaders for alternative evaluation frameworks for peer work. Peer work leaders sought to develop a peer-specific framework for evaluation that would enable peer workers to investigate the nature, practices and processes of peer relationships to support development and understanding of peer work, as well as provide evidence for the efficacy and value of this work to policy makers and service providers.

Collaborative Design:

In collaboration with UTS Centre for Social Justice and Inclusion, the project team designed and delivered two training workshops for peer work leaders on the Meaningful Evaluation Framework.

Recruitment and Workshops:

Ten peer workers, who are recognised leaders in community and health sectors, were recruited through an expression of interest (EOI) process to participate in this project. In the EOI process, the project team targeted peer work leaders from diverse social and cultural backgrounds, including: peer workers in paid and unpaid roles; peer workers from diverse geographical regions socio-economic, ethnic, and cultural backgrounds; and peer workers who were gender and sexuality diverse. Initially, peer work leaders engaged in a Meaningful Evaluation Framework workshop trainings, to increase knowledge and skill development in Evaluation Frameworks.

Deliberative Dialogue

After the initial workshops, peer work leaders attended Reflective Development Sessions to engage in a deliberative dialogue (Boyko et al., 2014) about the value of the Meaningful Evaluation Framework to peer work. In this dialogue, peer work leaders also explored potential adaptions of the framework to align with peer work principles and practices. Deliberative dialogue is described as a "system-level knowledge translation and exchange strategy" that aims to integrate scientific and contextual data through a process of group dialogue (Boyko et al., 2014, p.122). Reflective development sessions were audio recorded and transcribed as the basis for a report to be made available to the peer workforce.

This report is the outcome of these reflective sessions. It outlines the Meaningful Evaluation Framework, as well as key reflections and recommendations from the deliberative dialogue with peer workers.

MEANINGFUL EVALUATION FRAMEWORK

Current Evaluation Frameworks

Zappalà (2020) notes five key problems with current approaches to evaluation including: a reliance on 'impact value chains'; decontextualised outcomes; monetised outcomes; emphasis on external outcomes; and positivist approaches. This approach to measuring outcomes is criticised for being a "particular kind of technical, rational, secular scientific knowledge" (Hales, 2016, p.137) that fails to capture the complexity and impact of social practice (See Zappalà, 2020).

Peer workers may mobilise these kinds of outcome metrics and have been involved in evaluations that show the effectiveness of peer work in reducing hospital admissions, emergency department presentations, and increasing community mental health contact, with net savings for the health system (e.g., Hancock et al., 2021). However, peer work itself is not organised around decontextualised health outcomes. For peer workers, the nuances of personal recovery may not be contingent on measurable outcomes such as avoidance of health services or reduction in healthcare costs. Rather, many peer workers aim to build a relationship of mutual support where peers are equals, and engage in a dialogue of reciprocal meaning making (Mead, 2010). As Kemp et al. (2020) note, peer workers aim to "be with", not to "do to", and to "sit with the discomfort of a difficult situation" (p.53).

Peer work may also clash rather than correspond with 'mental health' service provision. Peer workers are often willing to explore the complexities of lived/living experiences, including non-medical and multiple explanatory frameworks for distress and extreme states of mind e.g., trauma or socio-political frameworks (Adame & Leitner, 2008; Mead, Hilton & Curtis, 2001). Peer workers also draw on the collective knowledge(s) of Consumer/Survivor and peer movements. For example, the Hearing Voices movement, which positions itself outside the mental health framework as a way of exploring and understanding extreme states of mind as common and meaningful variations of human experience (Hayward & May, 2007). Peer workers are also more likely to 'call out' medicalising and coercive practices in mental health services (Mancini, 2018). Yet outcome measures say little of the strains on peer workers and impact on peer work

practice of working in biomedically oriented systems that continue to pathologise human distress and structure, sanction and safeguard coercive practices (Byrne et al., 2016; United Nations, 2017), or of the benefits to people with lived/living experience from peer workers persistence in the face of these challenges.

In sum, the current language of linear outcomes for peer work, which miss the nuances of personal recovery and the costs of biomedical and coercive practice, restrict what is possible to *count* as important in peer work practice. So how then do we capture the value of peer work to people with lived/living experience? Underlying this question, is the deeper, and perhaps more important enquiry, of what is the meaning of peer worker practise – of being with, rather than doing to – to people with lived/living experience?

Towards Meaningful Evaluation

The Meaningful Evaluation Framework has been put forward as a "next generation" approach to evaluation that can capture the contextual meanings and experience of practice, rather than only measures of outcome (Zappalà, 2020). It draws on the Map of Meaning (Lips-Wiersma's & Morris, 2011; 2018), which provided a model for workers to explore and discover the contextual meaning of their work (See Figure 1).

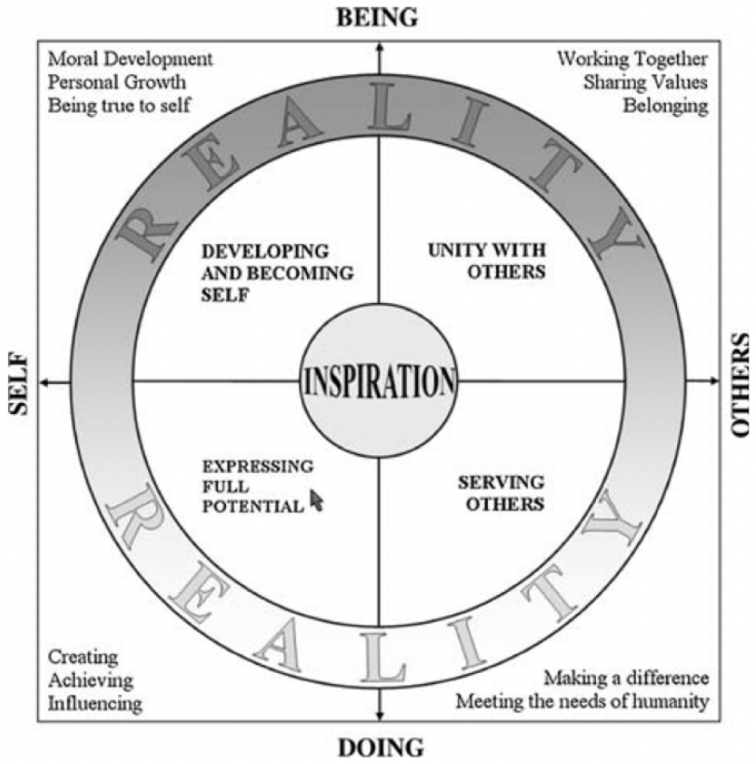
The four pathways of the Map of Meaning (Lips-Wiersma & Morris, 2011;2018) include:

- ⇒ **Developing the inner self**, which explores whether and how practice supports people to experience moral development, personal growth, or an authentic self;
- ⇒ **Unity with others**, which explores whether and how practice supports people to create a sense of connection and work together, share values, and create a sense of belonging;
- ⇒ **Serving others**, which explores whether and how practice provides people with opportunities to make a difference, and serves other and the planet;
- ⇒ **Expressing full potential**, which explores whether and how practice enables people to express their potential through creativity, and to achieve goals and influence others.

Lips-Wiersma and Morris (2011; 2018) argue that each element of meaning occurs in the context of a personal sense of hope, vision or "inspiration" and is also constrained or

enabled by the “reality” of the ‘real-world’ social context. Also, expressed in the Map of Meaning are the opposing forces of ‘being and doing’, as well as between the needs of ‘self and others’, which relate to the tensions between being in the world and expressing our purpose, and the need to fulfil tasks and contribute to the purpose of others.

Figure 1: The Map of Meaning



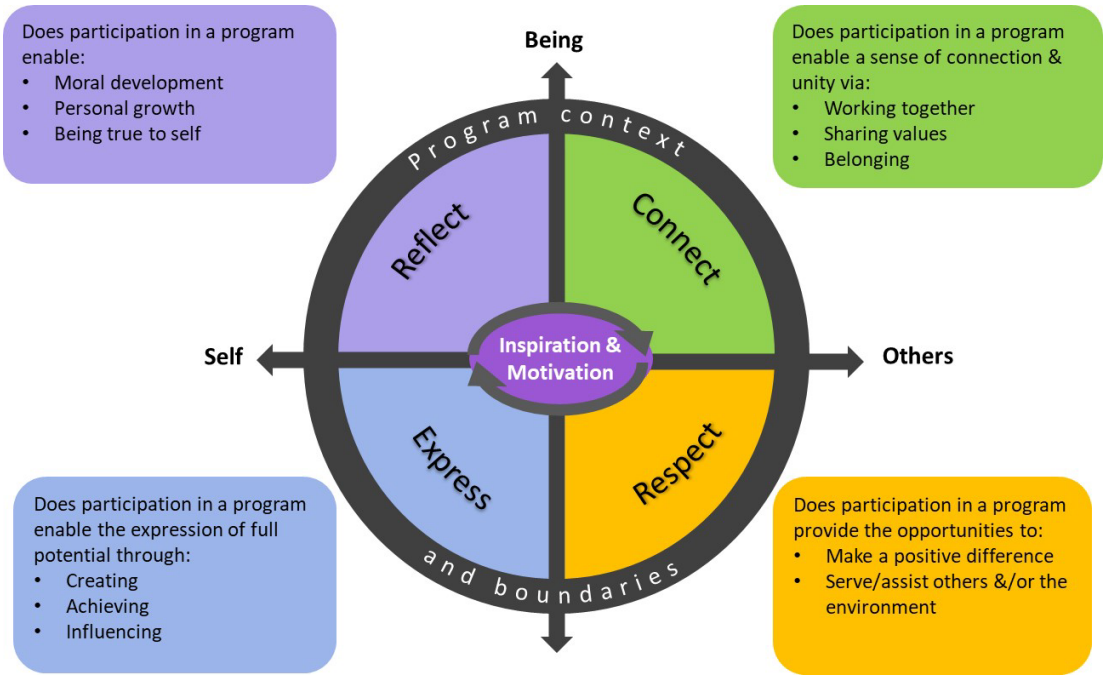
Source: Lips-Wiersma & Morris (2011)

Using the Evaluation Framework

The Meaningful Evaluation Framework doesn’t prescribe how data is collected or used, rather it points to the meanings that can be explored, and tensions that can be examined. Zappalà (2020) gives the example of ethics educators being able to capture the elements and complexity of their practice. In the sphere of self, ethics educators note increased awareness of themselves and of ethical perspectives, improved critical thinking, emotional intelligence, and relational skills etc. These kinds of complexities might be captured in interviews, focus groups, or surveys or even quantified in statistical measures (Zappalà, 2020).

Building on and adapting the work of Lips-Wiersma’s and Morris (2009), Zappalà (2020) has developed the Meaningful Evaluation Framework, which is summarised in Figure 2.

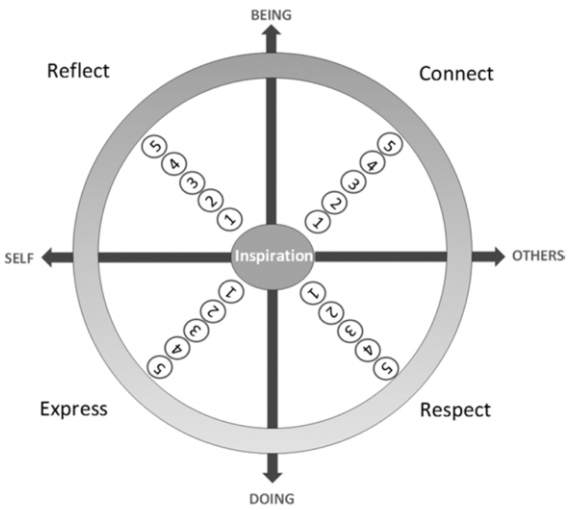
Figure 2: The Meaningful Evaluation Framework



Source: Zappalà (2021)

Zappalà (2020) also proposes ways in which meaning might be measured over time as "distance travelled" in a meaning scale (See Figure 3), which could be determined through gathering data on each element, once off or repeatedly e.g., "longitudinally".

Figure 3. Measuring Meaning as Distance Travelled



Source: Zappalà 2020

For peer work practice, the Meaningful Evaluation Framework could also be collaboratively produced (Zappalà, 2020) between an evaluator (e.g., peer worker) and a participant (e.g., person with lived experience). As such, the approach favours mutual inquiry and could align with the reciprocal and mutuality commitments of peer work practice.

REFLECTIONS AND RECOMMENDATIONS

Values Congruence of the Meaningful Evaluation Framework

In the deliberative dialogue, while acknowledging the value of quantitative measures, peer work leaders expressed frustration at the *primary* focus on reductive approaches to measuring the impact of peer work, such as measures of clinical recovery, health service use and economic savings. Current system measures were experienced as an imposition on peer work. Peer workers indicated that the Meaningful Evaluation Framework offered an approach that was more congruent with peer work values and could support evaluation without compromising or an imposing on peer work practice.

A Means of Exploring Complexity

In the deliberative dialogue, peer work leaders noted that a Meaningful Evaluation Framework might support exploration of the complexity of peer work. Peer work leaders stated that people with lived/living experience often spoke of feeling 'different' in conversations with peer workers, which can support them to come out of the 'fog' around mental distress. However, peer work leaders noted that, while there are several theoretical models that have been deployed to explain the nature and possibilities of peer-to-peer relationships and mutual growth, peer workers have struggled to capture what it is that is different and why change occurs. It was noted that the Meaningful Evaluation Framework might offer peer workers a way to explore and translate these experiences, and better articulate the value of peer work.

Next Steps

Peer work leaders noted possible next steps in the development of a Peer-specific Meaningful Evaluation Framework:

1. It might be useful to create a working model 'prototype' of a Peer-specific Meaningful Evaluation Framework to evaluate peer programs/services. This could then be refined and compared with existing tools. Creation of the framework would also involve development of questions that could be adapted to evaluate programs/services involving peers. The framework and questions could be sent out to:
    - Lived experience researchers to refine for specific contexts.
    - People with an intersectional lived experience of mental distress,

colonisation, hetero- and cis-normativity e.g., First Nations people, LGBTQIA+ populations for feedback and refinement.

2. It would also be useful to seek funding to:
    - Pilot and refine the Peer Work Meaningful Evaluation Framework
    - Teach the refined Peer Work Meaningful Evaluation Framework
    - Create a toolkit about the Peer Work Meaningful Evaluation Framework for peer workers/services.
3. It could be helpful to approach various organisations to increase awareness of the model and potential application, particularly organisations or networks employing or supporting peer workers. Examples could include:
    - NSW Consumer Peer Workforce Committee
    - NSW Consumer Workers Forum.

Prototype development

Peer work leaders made recommendations for developing a prototype for a Peer-specific Meaningful Evaluation Framework including:

1. To align with peer work practice, evaluation data should be interpreted with people with lived/living experience, as opposed to usual ways of interpreting data in academic and clinical settings. Being able to collaboratively produce data and measures of meaning is a benefit.
2. The framework could be adapted to suit peer work. Importantly, it could be less individually oriented as peer work is about mutuality and reciprocity, as well as being linked to broader collectives and social movements. As such, each element of the framework might be expanded:

⇒ **Reflect/Self-awareness:** This pathway might include development of collectives (collective growth), and not only growth of self. This would align with the development of collective knowledge(s) from Consumer/Survivor and peer movements and with Indigenous ways of being, knowing and doing, where self is not separate to the community.

⇒ **Connect:** This pathway might include sense of community. Peer-to-peer connection is about building a sense of community and history together, and one of peer works'

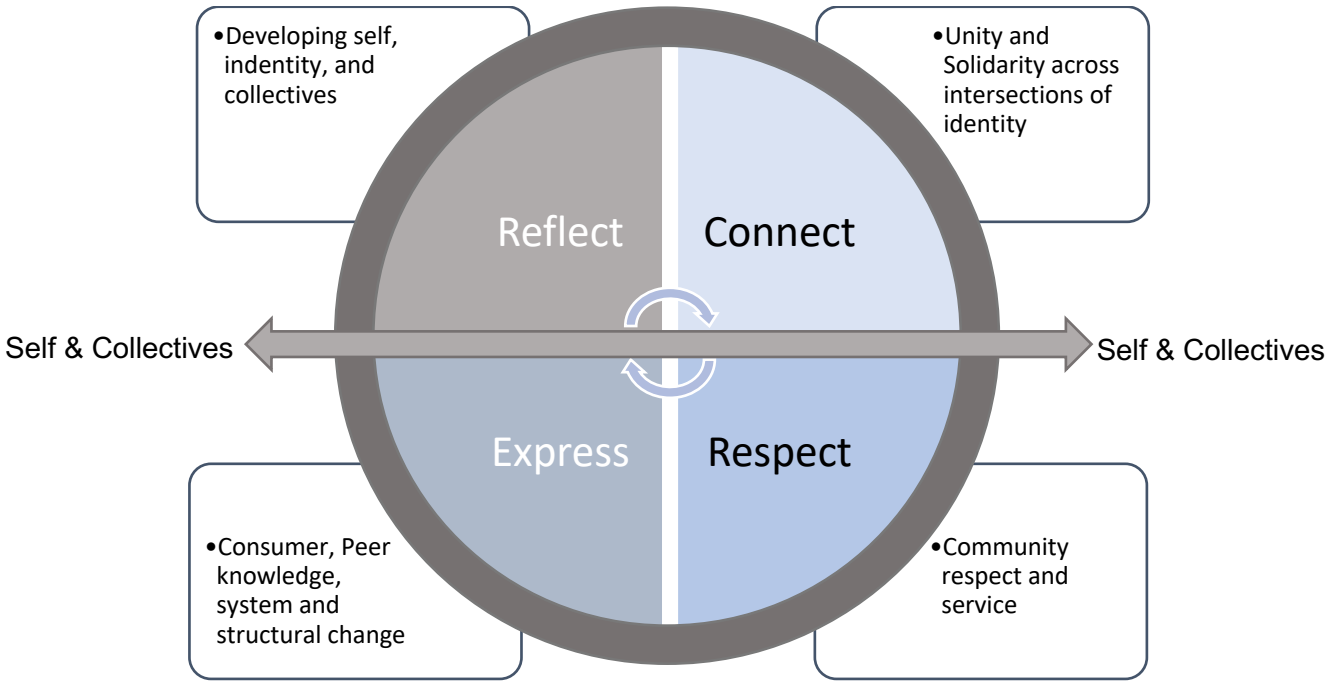
strengths are the communities it creates. Here, we might also consider how we create solidarity across intersections and dismantle oppression.

⇒ **Respect/Reciprocity:** This pathway might include the notion of respect for self and others. Peer work is about service to self and others, as there are not the same fixed hierarchical 'roles' enforced by other 'helping' disciplines. Expanding the notion of 'service', to include the whole community, might include how peer work practice is embedded and grounded in the long history of Consumer/Survivor movements.

⇒ **Express:** This pathway might include how peer work encourages and contributes to Consumer/Survivor knowledge and creates system and structural change. Also, it could be a place to consider how peer humour is used to connect and ease tensions, to create a laughing space that humanises health services. Perhaps we might also consider how hope moves to action and builds achievements as a collective.

Considering other elements of the model, peer work leaders noted that 'self and others' may not be in the same tension and may work in harmony. Also, that inspiration may be collective rather than personal. Still, the real-world barriers and enablers would be a big part of the discussion.

PEER WORK Meaningful Evaluation Framework (prototype draft)



Potential questions

Peer work leaders discussed potential questions that might be used for each pathway (quadrant) of the Meaningful Evaluation Framework. The questions, some of which are playfully posed, are listed below, staying true to the original wording. They are intended as a resource for development of ideas rather than as a fixed set of questions for each quadrant.

Reflect/Self-awareness:

- Has, or how has, this program/service/peer work helped you to rediscover/renew self, as a person/identity versus labels/diagnoses, etc. "Who are you now?"
- What do you stand for now?
- How do you understand what is important to you, has this changed, if so, how?
- How does this program/service/peer work contribute to "post-traumatic growth"?
- Has, or how has, this program/service/peer work allowed you to try out new or different ways of being in yourself or in the world?
- Has the program/service/peer work prompted you to write/ talk about/ make art about your experience or helped find pathways to the above?
- How many doctors have you fired since engaging with a peer worker?
- If your experience of personal change/growth were a playlist - what would the song titles be?
- Do you feel your opinions were valued and have I grown through involvement in this program/service/peer relationship?
- What will stick with you when this program/service/peer work finishes?
- What are the questions that have come to the surface for you because of this program/service/peer relationship?
- How has the program allowed you to make meaning of your own experiences/distress?
- Have there been any shifts in how you understand your experiences /symptoms?
- In the library of your life, what are the titles of the books that you are most excited to start working on?

Connect:

- How has this program/service/peer work supported you to better connect with yourself and others or community?

- Does, or how does, this program/service/peer work give you words to better describe your ideas about hope?
- Do you feel heard as a participant in this program/service/peer work relationship?
- What barriers to connection remain in relation to intersectional experiences?
- Has, or how has, your relationship with a peer worker, helped you to feel a part of a community. If not, how has it not?
- What opportunities did the peer work program give you to connect with like-minded people?
- How has connecting with a peer worker supported you in these... [insert previously mentioned topics above]?
- How would you describe your relationship with your peer worker?
- How has the peer work program connected you with Elders, mentors, logical aunties, uncles and ankles?
- What might be possible together that is less possible alone?
- Did the peer worker share their world in a way that helped?
- Was your peer worker able to meet and appreciate your authentic self?
- How has connecting with the program/service/peer worker supported your learning?
- How has connecting with a peer worker supported your ability to advocate for yourself and others?
- How has meeting/working with a peer worker role modelling recovery and hope impacted you?

Respect/Reciprocity:

- What would you tell past you about your experience of the program/service/peer work? What were the best parts, what were the scary/challenging parts, what have you gained?
- Was this program/service/peer work culturally safe for you? If so, how? If not, how was it experienced as unsafe?
- What parts of you felt most welcome in the peer worker relationship you had?
- How did the facilitators support people of diverse backgrounds and identities (e.g., LGBTIQA+/CALD/Neuro divergent) people?
- What was the experience/emotions felt when being with a person you know shared mutual experience? (And no agenda to their position)

- Did you have the opportunity to connect with peer workers from the communities that you belong to? E.g., First Nations communities, LGBTIQA communities, migrant or refugee backgrounds, and/or neurodiverse people?
- Did you feel this was a safe enough space to bring your 'big' feelings to?
- What moments allowed you to feel like you were also contributing to this relationship/service/community?
- What was/how did your own participation support healing?
- What makes this space safe enough to share for you?
- What might you bring back to your tribe/clan/collective?
- What can you take away to your local communities/areas from being part of this process?
- How has this program/service/peer work allowed you to explore your boundaries and understand others boundary setting?
- What will you miss when the peer work relationship ends?

Express:

- What were the things that were unique, such as being given space to be heard, felt and honoured?
- How does the program/service/peer worker allow and encourage you to express your identity within the support received?
- How have you discovered/re-discovered your passions, interests, what brings you joy/contentment etc?
- How does this program/service/peer work enable safe (enough) spaces for you to be heard and seen and your needs to be expressed?
- Could this be flipped onto peer workers as the recipient of the survey/evaluation? E.g. How did the support/relationship help you? What did you learn from the person/relationship? Were there transformative moments in the relationship?
- What do you feel like you taught your peer worker?
- For a group environment/ program: How have you contributed to the needs of the group/others in the group, or similar?
- What did you learn in the peer worker relationship that you will draw on in other future relationships?
- How has this process allowed you to role model or learn from the role modelling of others etc? What did you learn from others modelling etc.

- What do you wish your peer worker would take away from your time together?
    - Here questions could focus on connecting with volunteer experiences, socio-political interests, spiritual communities, giving back to community/family/family of choice etc.
- Have you learnt skills/used your lived experience to support your friends/family/community?
- What things might I speak a little bit more loudly or differently about so others can understand what I need and have opportunities to respond?
- What new meaning of life have you found through working with peers?
- Would you describe your peer worker as an influencer?
- Has, or how has, this program/service/peer work relationship motivated you?
- As a result of the program/service/peer work, are you able to wear your mental distress more lightly?
- What new ideas do you have about recovery since you started working with a peer worker?
- Do you have more strength/hope?
- Did you hear about recovery for the first time from your peer worker?
- How do you feel about this peer relationship ending?
- Were you able to laugh with your peer worker?
- Has working with your peer changed or altered your view of self-empowerment/self-advocacy?
- In 5 years' time, looking back on your experience of working with a peer worker, what do you think you will remember?"
- How has your definition of hope changed?
- Has this program prepared you for the next step on your journey? If it has, how?
- If hope works, what will tomorrow look like?
- What do you wish you could have done with your peer worker that wasn't possible?
- How does the evolution of hope develop in intrapersonal/interpersonal worlds for the person with lived experience because of the program/service/peer work relationship?

Potential applications

This document does not seek to outline all potential applications, only those raised in the dialogue with peer work leaders. Peer work leaders noted potential applications of a Peer Work Meaningful Evaluation Framework including:

1. An option for NSW Peer Workforce Framework or Consumer Workers Forum for evaluation of programs/services/peer work.
2. A Primary Health Network lived experience evaluator tool.
3. A tool for evaluation of other health programs/services.
4. A conversation point, for supervision or for working with a person with lived/living experience.
5. A tool might be used to educate and politicise peer workers, who are increasingly co-opted by health systems and disconnected to Consumer/Survivor knowledges.

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