

Overview

Consumer and Family Member Employees Recruitment and Retention Checklist and Guidelines

PURPOSE

The purpose of the Human Resource Checklist and Guidelines is to provide a discussion framework for Working Well Together (WWT), public mental health organizations, their communities and human resource providers to identify policies, procedures, changes or accommodations that are necessary to successfully recruit, develop and retain persons with lived experience into the workforce based upon overall needs in the public mental health field and their own unique organizational characteristics.

Employing persons with lived experience is part of the shift in public mental health to move from a “medical” to a “recovery” focused system of services. Recent studies on the efficacy of mental health service delivery indicate that employing persons with lived experience provides a number of benefits for clients, communities and public mental health organizations that include:

- Serve as recovery role models for consumers
- Represent consumer needs in the service system
- Sources of information and motivation
- Serve as mentors for both peers and clients
- Contributes to persons with lived experience personal recovery
- Fills gaps and augments services for clients
- Liaisons between client and staff populations
- Refutes biases and stigmas regarding persons with lived experience ability to lead independent, productive lives

HOW TO USE THE CHECKLIST AND GUIDELINES

The Checklist and Guidelines address the priority human resource policies, procedures or services that public health organizations, their respective human resources and the mental health profession need to address in order to assimilate persons with lived experience as employees. The Checklist and Guidelines can be used by public mental health organizations for discussion and planning of services in their communities related to recruiting persons with lived experience and acculturating them into the public mental health workforce.

The human resource Checklist and Guidelines organize the human resource priorities into eight recruitment and retention areas based upon the WWT *Client, Family, Parent/Caregiver Mental Health Employment Challenges and Solutions* Survey of November 2008:

- I. Workforce Preparation
- II. Recruitment and Hiring
- III. Current Workforce Attitudes, Resistance
- IV. Jobs, Careers
- V. Pay, Benefits
- VI. Orientation, Training and Supervision
- VII. Support and Accommodations
- VIII. Retention and Acculturation

CHECKLIST

For each of the eight recruitment and retention areas the checklist details the priority policies, procedures, processes, services or partnerships identified in the assessment and research as necessary for successful employment and acculturation of persons with lived experience into the public mental health workforce. It then asks the user to identify their organization's progress on the priority in one of three ways:

1. Planning (The organization is in the process of planning their preferred actions)
2. In Practice (The organization has implemented action(s) to address the priority)
3. Not Applicable (The priority does not apply to the organization)

GUIDELINES

For each of the eight recruitment and retention areas, a guideline is provided that:

- Identifies the recruitment and retention area and priority
- Provides a brief description of the issues or needs associated with the priority
- Describes recommended action(s) as identified in the WWT assessment feedback, or best practices in human resources and public mental health field

TERMS USED IN THE CHECKLIST AND GUIDELINES:

1. "WWT" Working Well Together (WWT), a collaborative of the California Network of Mental Health Clients, NAMI California, United Advocates for Children and Families, and the California Institute for Mental Health.
2. "Lived Experience" refers to clients, parents, family members or caregivers using services in the public mental health system or providing care to persons in the system. These are the identified target populations for which WWT aims to assist public mental health organizations to recruit and ultimately retain as employees in order to fill employment gaps in the public mental health system.
3. "Public Mental Health Organizations" refers city, county, state, federal public and quasi-public organizations that provide a continuum of services in the behavioral and mental health system.
4. "CBO" refers to community based organizations that deliver and/or support the delivery of services to consumers in the public mental health organizations.

CONCLUSION

The transition from a medical to a recovery based service delivery system requires the adoption and integration of principals, practices and services where recovery is the life long pursuit of well being as opposed to a series of medical interventions. The ability to improve the overall quality of services within the public mental health system is a primary goal of WWT and its partners. The next phase of this project includes planning sessions that will bring public mental health organizations together to share best practices, determine specific actions and performance measures. The actions and measures identified in the planning process will enable public mental health to measure the improvements and understand the impacts of how employing persons with lived experience contributes to service quality.

RESOURCES AND REFERENCES

Renaissance Consulting Group prepared the Recruitment and Retention Checklist, Guidelines and Overview for Working Well Together (WWT). The Checklist and Guidelines will be used in fiscal year 2009/2010 as part of WWT's work with public mental health organizations to plan, develop and deliver support services that will assist the organizations in recruiting persons with lived experience i.e. clients, family members, parents, caregivers or others as well as acculturating the value of employing those with "lived experience" into their work culture. The content of the Checklist and Guidelines is based upon WWT's needs assessments, selected research and background information provided by WWT to Renaissance Consulting Group.

REFERENCES

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Watson S., Spear S., Shilton A, (PDF) (January 2009) Report of The Findings Of The California Consumer Employment Summit: Welcoming Diversity and Recovery in the Workplace (October 2008)

California Mental Health Planning Council (October 2003) (PDF) Consumer and Family Member Employment in the Public Mental Health System Retrieved May 25, 2009 from the California Mental Health Directors Web site <http://cmhda.org/go/MentalHealthServicesAct/WorkforceEducationandTrainingWET/WETDocuments.aspx>

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Renaissance Consulting Group provides organizational development and human resource consulting services to large and small private and public sector organizations, both national and international. Expertise in strategic planning, organization development, human resources, program development and evaluation. Work with groups of 25 – 200+ to create, document and implement strategic plans that embrace whole community priorities, motivate, reward and measure organization-wide or individual action. Projects include: world-wide logistics and financial strategic plans for Hewlett-Packard; community-based service planning to address substance abuse services for persons associated with the correctional system in Stanislaus County, California; design, research and evaluation of criminal justice programs and services for criminal justice agencies in Stanislaus County, California; and, development of a best-practices audit for employers and third-party investigations in conjunction with Littler-Mendelson the nation's largest labor law firm.

Consumer and Family Member Provider Employment Recruitment and Retention Checklist

I. WORKFORCE PREPARATION Refer to HR Guideline I for suggested steps to accomplish these tasks.	Planning	In Practice	Not Applicable
1. Conduct ongoing workforce needs assessments to identify gaps between community demographics and staffing and design recruitment, training and educational plans to address staffing gaps.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Establish a workforce plan with goals and timelines for diversifying the workforce and employing staff with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Include in the workforce plan "grow your own" recruiting and training strategies to foster the entry of priority populations (i.e. culturally diverse, persons with lived experience etc.) into careers in public mental health.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Work with HR to develop compliant development, counseling, performance evaluation and management processes and procedures geared toward attracting and retaining people with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Identify and commit resources to accomplishing the goals and timelines of the workforce plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Verify policies and procedures are legally compliant and reflect best practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Check all organizational materials (i.e. promotional, recruiting, policies, reports, publications etc.) and review procedures for discriminatory or exclusionary language or practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Check that all organizational materials reflect the cultural diversity of the county's population.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Planning	In Practice	Not Applicable
9. Establish policies and procedures to address “dual relationship” staff (i.e. peer and provider, peer-to-peer, peer-to-consumer) that have the potential for conflicts of interest, confidentiality, privacy, legal risks or exposures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Determine and establish policy regarding persons with lived experience who receive service(s) i.e. precluding them from receiving services at their employment facility etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Establish legally compliant employment records including appropriate record keeping, access and controls to insure adherence to ADA, HIPPA, Confidentiality, Privacy, employment laws, regulations and guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Identify and utilize resource agencies or organizations (i.e. local community resources, DMH, DOR, Working Well Together, Colleges, Universities, etc.) for technical assistance with marketing, recruitment, job readiness training, employee training and development, and, retention.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II. RECRUITING AND HIRING			
Refer to HR Guideline II for suggested steps to accomplish these tasks.			
1. Educate HR personnel regarding goals, timelines and requirements for hiring staff with 1) lived experience, or, 2) who can work in a diverse environment that includes persons with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Identify or create job classifications for which lived experience knowledge, skills, abilities or attributes are applicable and/or preferred.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Identify or create positions within job classifications for which lived experience knowledge, skills, abilities or attributes are applicable and/or preferred.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Planning	In Practice	Not Applicable
4. Establish core competencies for each position that identifies required and/or preferred lived experience knowledge, skills, abilities or attributes to determine appropriate 1) employment relationship i.e. employee, contractor etc., 2) compensation grades, rates and benefits, 3) job placement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Work with HR to develop compliant position announcements, application or recruitment processes or procedures geared toward attracting diverse applicants or persons with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Review or create legally compliant job descriptions checking that they accurately state the essential job functions, specific lived experience knowledge, skills, abilities or attributes (required, desired or preferred).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Establish selection criteria for each position to be used by interviewer(s) to assess to what degree an applicant meets the lived experience knowledge, skills, abilities or attributes (required, desired or preferred).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Interviewers: 1) Understand risks and exposures regarding disclosure, confidentiality, privacy rights, etc., 2) Are trained in the correct use of selection criteria to legally solicit and correctly evaluate whether an applicant: 1) has applicable lived experience, and 2) their experience meets the job requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Perform pre-employment checks for possible conflicts of interest, confidentiality, privacy or other legal risks or exposures prior to extending job offer or placement of lived experience employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. The organization and/or its human resources are able to meet the linguistic needs of multi-cultural applicants in terms of communication, written materials etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

III. CURRENT WORKFORCE ATTITUDES, RESISTANCE Refer to HR Guideline III for suggested steps to accomplish these tasks.	Planning	In Practice	Not Applicable
1. Employ methods to assess resistance, fear or mistrust among the current workforce and client community regarding employment of persons with lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Develop goals and measures to reflect employment of persons with lived experience as an integral component of the workforce and a workplace value as opposed to satisfying "quotas".	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV. JOBS, CAREERS Refer to HR Guideline III for suggested steps to accomplish these tasks.	Planning	In Practice	Not Applicable
1. Collaborate with HR, other agencies or organizations to market and/or conduct mental health career job readiness, employability, and/or life skills classes for the hard to employee, persons with lived experience or culturally diverse populations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Identify and establish career paths for all classifications and positions that include the educational, experience based or other pre-requisites for advancement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Educate employees on career paths, opportunities and processes available to transition to higher levels of employment (i.e. non-benefited to benefited positions, higher classifications, meet certification or training pre-requisites, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Persons with lived experience are solicited and included in the development of job classifications, positions and career paths.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

V. PAY, BENEFITS Refer to HR Guideline V for suggested steps to accomplish these tasks.	Planning	In Practice	Not Applicable
1. For job classifications and positions: establish appropriate 1) employment relationship i.e. employee, contractor etc., 2) compensation grades, rates, and 3) benefits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Organization and/or Human Resources staff can accurately counsel potential lived experience employee who would transition from “benefited” support to a paid wage regarding the financial impact of transitioning to employment so they can make an informed employment decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Organization has the knowledge and resources to coordinate their lived experience employees compensation and wages with benefited support i.e. SSI etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Organization has the knowledge and resources to acquire or assist persons with lived experience in acquiring health benefits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Organization can provide counseling or support to persons with lived experience regarding compensation, health or financial benefits in culturally appropriate languages related to their employee and community demographics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VI. ORIENTATION, TRAINING AND SUPERVISION Refer to HR Guideline VI for suggested steps to accomplish these tasks.	Planning	In Practice	Not Applicable
1. Collaborate with HR, other agencies or organizations to market and/or conduct mental health career job readiness, employability, and/or life skills classes for the hard to employee, persons with lived experience or culturally diverse populations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Train on compliance and accommodations, and, obtain acknowledgements of receipt or certification of compliance from all staff (i.e. volunteers, contractors, employees, and managers) regarding applicable laws (i.e. ADA, HIPPA, Confidentiality, Privacy etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Identify and establish procedures to address challenges or barriers to incorporating persons from culturally diverse populations or persons with lived experience into career paths.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Identify and make resources available to staff to obtain training, certification or experience necessary for employment or advancement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Include contracted agencies in trainings and policy development or revision.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Provide a thorough orientation for all staff prior to starting employment on policies, procedures and applicable laws (i.e. ADA, HIPPA, Confidentiality, Privacy etc.) Obtain Acknowledgement of Receipt or Compliance Certification for related policies, procedures or requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Identify core competency standards for lived experience knowledge, skills, abilities and attributes. Develop and provide training and assessments that measure progress or achievement of core competency standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Utilize inclusionary methods to develop and conduct training: (instructional methods, expert or peer instructors or mentors, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Planning	In Practice	Not Applicable
9. Establish training and development methods to increase the cultural and linguistic competence of the mental health workforce.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Integrate culture and diversity into all trainings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Establish leadership and management competencies related to training, management, performance evaluation and coaching culturally diverse and employees with lived experience. Include the competencies in leaders and manager performance evaluation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Establish local and regional educational partnerships.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Participate in knowledge exchange networks with regional partnerships such as the CMHDA.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VII. SUPPORT AND ACCOMODATIONS			
Refer to HR Guideline VII for suggested steps to accomplish these tasks.			
1. Establish processes to assist persons with lived experience to be a successful employee i.e. on-going training, counseling or support, mentorship etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Work with human resources to develop and implement reasonable accommodations for employees that include: interviews, job accommodation or modification, work schedule modification or accommodation to attend scheduled appointments for covered conditions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Identify and train supervisory staff to work with human resources regarding development of reasonable accommodations and managing employees who have accommodations. Include scheduled reviews of accommodations, methods to assess effectiveness and modify as necessary to support employee success.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Planning	In Practice	Not Applicable
4. Establish both periodic and on-going review processes for new employees that address employees success i.e. assimilating into work culture, job performance, training and development etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Build and maintain a supportive work culture in which staff feels comfortable disclosing their lived experiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Train supervisory and all staff on policies and procedures related to dual relationships. Address violations of policies or procedures according to established procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Maintain consistency in evaluating performance of lived experience and other staff i.e. if staff (regardless of status) who are unable to perform job receive the same discipline, assistance or referral to appropriate services and are reinstated after according to performance terms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VIII. RETENTION AND ACCULTURATION			
Refer to HR GuidelineVIII for suggested steps to accomplish these tasks.			
1. Conduct ongoing assessment and establish programs or procedures that identify and address organizational tensions related to employment of persons with lived experience or other barriers to a positive work culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Establish methods to assess (i.e. exit interviews, employee surveys etc.) and improve the effectiveness of organizational retention strategies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Leadership visibly promotes and supports the value of lived experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Working Well Together

Training and Technical Assistance Center

	Planning	In Practice	Not Applicable
4. Provide ongoing training for current staff and make sure organizational information promotes and supports the value of lived experience in the mental health workforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Collaborate with contract agencies, community based organizations, other related governmental and non-profit organizations to indentify and establish best practices, market, educate and increase the mental health workforce.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Include culturally diverse and staff with lived experience in planning and development activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I. DESCRIPTION

Establish plans, goals, timelines and assign resources for recruiting, hiring and integrating persons with lived experience into the organization. Plans and hiring goals should be based upon community and client demographics. Plans and goals should also identify specific organizational changes and methods to measure the organization's progress regarding the successful employment of persons with lived experience and acculturating the value of "lived experience" as essential component of a recovery based system.

II. RECOMMENDED ACTIONS

- A. Conduct ongoing community assessments to identify gaps between community demographics and staffing and develop plans to diversity the workforce.
- B. Include in the workforce plan "grow your own" strategies that actively recruit, train and encourage persons from priority populations (i.e. culturally diverse, persons with lived experience etc.) into careers in public mental health.
- C. Benchmark best practices and work with HR to establish legally compliant policies and procedures that address the employment, development and management of persons with lived experience.
- D. Verify that organizational materials (i.e. promotional, recruiting, policies, procedures, reports, publications etc.) are free of discriminatory or exclusionary language or practices and reflect the diversity of the community population.
- E. Establish policies and procedures to address "dual relationships" (i.e. peer and provider, peer-to-peer, peer-to-consumer) that have the potential for conflicts of interest, confidentiality, privacy, legal risks or exposures.

- F. Provide policy, procedures and guidelines for employees with lived experience and their managers regarding their personal recovery and use of service(s) i.e. precluding them from receiving services at their employment facility etc.
- G. Establish legally compliant employment records including appropriate record keeping, access and controls to insure adherence to ADA, HIPPA, Confidentiality, Privacy, employment laws, regulations and guidelines.
- H. Identify and utilize resource agencies or organizations (i.e. local community resources, DMH, DOR, Working Well Together, Colleges, Universities, etc.) for technical assistance with marketing, recruitment, job readiness training, employee training and development, and, retention.

I. DESCRIPTION

Hiring persons with lived experience and others who will embrace and support a diverse workforce is essential to improving the overall quality of services and transitioning from a medical to a recovery based system. The public mental health organization must work with its human resource, partner service agencies and public, private and community resources to actively recruit and adequately prepare diverse persons and those with lived experience for successful employment.

II. RECOMMENDED ACTIONS

- A. Benchmark best practices and work with HR to identify or create job classifications, positions and descriptions that establish related lived experience core competencies (i.e. experience knowledge, skills, abilities or attributes) and whether they are required, desired or preferred. Determine appropriate employment 1) selection criteria; 2) relationship (i.e. employee, contractor etc.), 2) compensation grades, rates and benefits, and 3) job placement.
- B. Benchmark best practices and work with HR to develop compliant position announcements, application or recruitment processes or procedures geared toward attracting diverse applicants or persons with lived experience.
- C. Train interviewers to: 1) Understand risks and exposures regarding disclosure, reasonable accommodation (ADA), confidentiality, privacy rights, HIPPA etc., 2) use selection criteria to legally solicit and correctly evaluate whether an applicant: a) has applicable lived experience, and b) their experience meets the job requirements.
- D. Employ resources or the assistance of human resources to meet the linguistic needs of multi-cultural applicants in terms of communication, written materials etc.

- E. Perform pre-employment checks for possible conflicts of interest, confidentiality, privacy or other legal risks or exposures prior to extending job offer or placement of persons with lived experience.
- F. Provide staff or access to others who can accurately counsel, educate and enable persons with lived experience to make informed decisions regarding the financial impacts of transitioning from "benefited" support to employment.
- G. Identify and utilize resource agencies or organizations (i.e. local community resources, DMH, DOR, Working Well Together, Colleges, Universities, etc.) for technical assistance with marketing, recruitment, job readiness training, employee training and development, and, retention.

HUMAN RESOURCE GUIDELINE: III. Current Workforce Attitudes and Resistance

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I. DESCRIPTION

Current staff may have a lack of knowledge, fear, mistrust, concerns or resistance regarding employment of persons from diverse cultures or with lived experience. Employing methods to assess current staff needs and assist their adoption of recovery based principals including supporting diverse persons and those with lived experience as peers and colleagues is essential to improving the overall quality of care in the mental health system.

II. RECOMMENDED ACTIONS

- A. Survey current staff and client community regarding resistance, fear, concerns or mistrust concerning employment of persons with lived experience.
- B. Develop goals and measures to reflect employment of persons with lived experience as an organizational value and integral component of the system as opposed to satisfying "quotas" or meeting mandated compliance.
- C. Benchmark best practices, develop and implement actions to address staff or client resistance, fear, concerns or mistrust regarding persons with lived experience as peers or providers.
- D. Educate staff that employment of diverse persons and those with lived experience is essential to adoption of recovery principles. Document, measure and communicate how staff, clients and the organization benefit from the knowledge, experience, services and contributions provided by persons with lived experience.
- E. Train supervisors to coach, counsel and assist employees with supporting diverse persons and those with lived experience as peers and colleagues and to proactively address employee actions or behaviors that negatively impact employee relations or service delivery.

I. DESCRIPTION

An essential component of transitioning the public mental health field to a recovery based system is the employment of diverse persons and persons with lived experience. Public mental health organizations must create career paths, training, education and related licenses and certifications that will enable, encourage and support career employment of diverse persons and those with lived experience in public mental health.

II. RECOMMENDED ACTIONS

- A. Collaborate with HR, other agencies or organizations to market and/or conduct mental health career job readiness, employability, and/or life skills classes for the hard to employee, persons with lived experience or culturally diverse populations.
- B. Benchmark best practices and work with human resources to identify and establish career paths and pre-requisites for advancement for all classifications and positions that include the education, experience, skills, abilities or attributes, certifications or licenses necessary for career advancement.
- C. Educate employees on career paths and opportunities and provide access to resources that will facilitate transition to higher levels of employment (i.e. non-benefited to benefited positions, higher job classifications, meet certification or licensing requirements etc.)
- D. Include diverse staff and persons with lived experience in the development of job classifications, positions, career paths.
- E. Benchmark best practices and implement programs or services to employ diverse persons and those with lived experience as trainers, supervisors or leaders or to provide support for their peers as well their organizations.

I. DESCRIPTION

Public mental health organizations must identify the 1) employment relationship i.e. employee, contractor etc., 2) compensation grades, rates, and benefits associated with new job classifications or positions implemented as part of hiring diverse persons or those with lived experience. This will require the addition of staff or resources that can accurately educate and counsel persons receiving “benefited” financial support regarding the monetary impact of transitioning to employment.

II. RECOMMENDED ACTIONS

- A. Benchmark best practices and work with human resources to identify and establish for all newly created job classifications and positions appropriate: 1) employment relationship i.e. employee, contractor etc., 2) compensation grades, rates, and benefits.
- B. Provide staff or access to other resources that can accurately counsel, educate and enable persons with lived experience to make informed decisions regarding the financial impacts of transitioning from “benefited” support to employment.
- C. Provide staff or access to other resources that have the knowledge and resources to coordinate compensation and wages with benefited supports (i.e. SSI etc.) for related employees.
- D. Provide staff or access to other resources that have the knowledge and ability to assist persons with lived experience in acquiring health benefits.
- E. Provide staff or access to other resources that can provide counseling or support to persons with lived experience regarding compensation, health or financial benefits in culturally appropriate languages related to their employee and community demographics.

HUMAN RESOURCE GUIDELINE: VI. Orientation, Training, Supervision

I. DESCRIPTION

In addition to providing new employee orientation, public mental health organizations need to train existing staff and supervision regarding unique issues associated with employing diverse persons or those with lived experience. These include: cultural diversity, dual relationships, and principals of recovery based versus medically based service delivery.

II. RECOMMENDED ACTIONS

- A. Benchmark best practices collaborate with human resources, other agencies or organizations to market and/or conduct mental health career job readiness, employability, and/or life skills classes for the hard to employee, persons with lived experience or culturally diverse populations.
- B. Identify core competency standards for lived experience knowledge, skills, abilities and attributes. Develop and provide training and assessments that measure individual progress or achievement of core competency standards.
- C. Provide a thorough orientation and train existing staff regarding compliance, accommodations and applicable laws (i.e. ADA, HIPPA, Confidentiality, Privacy etc.)
- D. Identify training, certification or experience necessary for employment or career advancement provide or assist diverse persons or those with lived experience in accessing resources to gain employment or career advancement.
- E. Benchmark best practices and establish education and training to assist employees with transitioning and supporting a recovery based system and organizational culture. These can include establishing local and regional educational partnerships or joining professional and peer networking organizations. Include contracted agencies in trainings and policy development or revision.

HUMAN RESOURCE GUIDELINE: VI. Orientation, Training, Supervision

- F. Establish training and development methods to increase the cultural and linguistic competence of the mental health workforce. Integrate culture and diversity into all trainings.
- G. Establish leadership and management competencies related to training, management, performance evaluation and coaching culturally diverse and employees with lived experience. Include the competencies in leaders and manager performance evaluation.

HUMAN RESOURCE GUIDELINE: VII. Support and Accommodation

I. DESCRIPTION

Diverse persons and those with lived experience have unique needs and barriers regarding employment. To successfully recruit, hire and retain diverse persons and those with lived experience, public mental health must identify appropriate accommodations and develop methods to support these employees throughout their careers.

II. RECOMMENDED ACTIONS

- A. Benchmark best practices, partner with local, regional and other resources to assist persons with lived experience in achieving successful employment (i.e. on-going training, counseling or support, mentorship etc.).
- B. Use mental health resources (WWT, NAMI, CIMH, etc.), your human resource department or local, regional or national resources (i.e. JAN) to develop and implement reasonable accommodations for employees associated with: interviews, job accommodation or modification, work schedule modification or accommodations.
- C. Identify and train supervisory staff to develop reasonable accommodations and manage employees who have accommodations. Include scheduled reviews of accommodations, methods to assess effectiveness or modify as necessary to support employee success.
- D. Establish both periodic and on-going reviews for new employees measure the employee's progress i.e. assimilating into work culture, job performance, training and development etc.

HUMAN RESOURCE GUIDELINE: VII. Support and Accommodation

- E. Implement practices that support a recovery based work culture in which staff feel comfortable and know how to appropriately disclose and apply their culturally based or lived experiences in the work environment.
- F. Train supervisory and all staff on policies and procedures related to dual relationships. Address violations of policies or procedures according to established procedures.
- G. Maintain consistency in evaluating performance of diverse persons or those with lived experience i.e. if staff (regardless of status) are unable to perform their job be consistent in coaching, counseling or referring staff to resources to assist them in addressing performance areas. Reinstatement employees who successfully complete performance improvement terms.

HUMAN RESOURCE GUIDELINE: VIII. Retention and Acculturation

I. DESCRIPTION

Public mental health is shifting from a medical to a recovery based system. Employing a workforce that reflects the diversity of its client populations (i.e. diverse persons and those with lived experience) is a principal component of recovery based systems. Successfully shifting to a recovery based culture and retaining persons with lived experience will require public mental health organizations to employ methods to transition existing staff and acculturate consumer and family member employees.

II. RECOMMENDED ACTIONS

- A. Survey and measure existing employee attitudes, issues, concerns, fears, or tensions related to employment of persons with lived experience or other barriers to a positive work culture.
- B. Assess and measure the organizations progress toward adopting a recovery based service model regarding overall quality of services and employee retention. These can include: exit interviews; employee, client or community surveys; compliance ratings or rankings; or, other performance measures.
- C. Require that leadership visibly promotes and supports the value of lived experience.
- D. Provide ongoing training for current staff and make sure organizational information promotes and supports the value of lived experience in the mental health workforce.
- E. Collaborate with contract agencies, community based organizations, other related governmental and non-profit organizations to indentify and establish best practices, market, educate and increase diverse persons and those with lived experience in mental health workforce.
- F. Include culturally diverse and staff with lived experience in planning and development activities.