

**Peer Mentoring:
A Workshop Series for
Direct-Care Workers in
Home and Residential Care**

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The nonprofit **Paraprofessional Healthcare Institute** (PHI) works to strengthen the direct-care workforce within our nation's long-term care system through developing innovative approaches to recruitment, training, and supervision; client-centered caregiving practices; and effective public policy. PHI's work is guided by the belief that creating quality jobs for direct-care workers is essential to providing high-quality, cost-effective services to long-term care consumers.

PHI's workplace practice and caregiving innovations have been developed in cooperation with a network of direct-care staffing agencies and training programs, including **Cooperative Home Care Associates** of the South Bronx and **Home Care Associates of Philadelphia**, and with **Independence Care System**, a nonprofit managed long-term care program for people living with physical disabilities in New York City. Through its consulting practice, PHI helps providers across the long-term care spectrum adapt these and other field-tested practices to fit their environments and needs.

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Additionally, PHI sponsors **Health Care for Health Care Workers** (www.hchcw.org), an initiative working to expand health care coverage for direct-care workers, and the **Northern New England LEADS Institute**, which provides training to nursing homes and home care agencies in Maine, New Hampshire and Vermont working to create person-centered cultures and supportive workplaces. PHI's state-based policy and practice experts also work with providers, consumers, and worker organizations in New York, Pennsylvania, Massachusetts, Michigan, North Carolina, Oregon, and Iowa. For more information on PHI's consulting services, please e-mail: info@PHInational.org.

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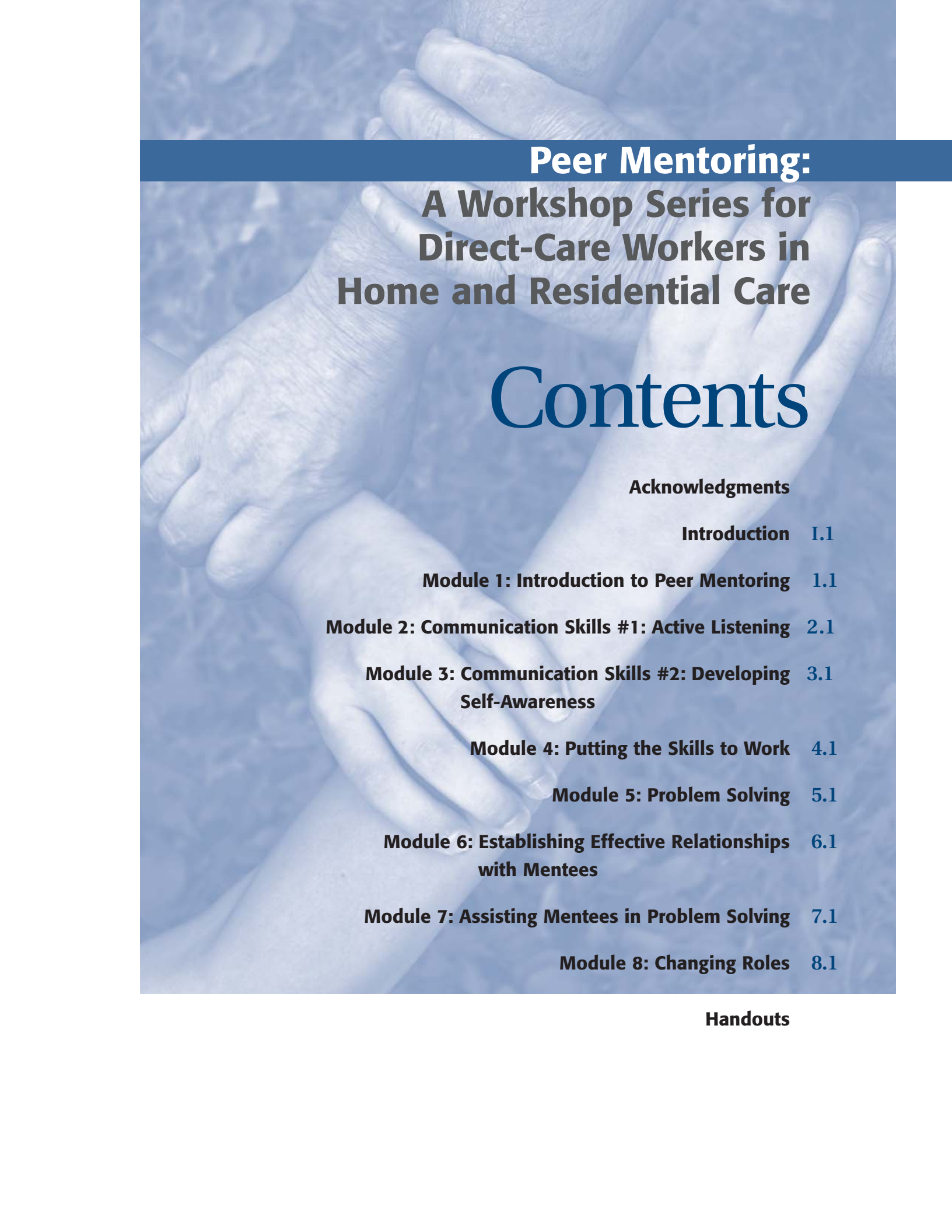
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Module 3

Communication Skills #2— Developing Self-Awareness

Goal

- To engage participants in a process of self-reflection that will help them to investigate barriers to effective listening—including assumptions and judgments about people who are different from themselves—and to apply the strategy of pulling back from their own emotions.

Time

2 hours, 45 minutes (3 hours, 30 minutes, with opening and closing activities)

Activities	Methods	Time
3.1 Exploring Assumptions	Large-group exercise	30 minutes
3.2 Personal Styles	Large-group exercise, discussion	60 minutes
<i>Break</i>		15 minutes
3.3 Pulling Back	Demonstration role play, interactive presentation, brainstorming, small-group work, discussion, individual exercise and pairs work	60 minutes

Supplies

- Flip chart, markers, and tape
- Paper and pencils
- Instructor's Guide, “Personal Style Continuum Statements” (p. 3.13)
- (optional) Activity 3.2: Tape to create a continuum line on the floor

Handouts

- Handout 15: “If You Had a Choice”
- Handout 16: “Personal Style Continuum”
- Handout 17: “Choosing to Pull Back” (three pages)
- Handout 18: “Pulling Back: When Feelings Get in the Way of Listening”

Advance Preparation

Review all training and presentation materials for each activity.

Prepare a flip chart page with the day’s agenda, and post it where it can remain throughout the day.

Plan an opening activity of 15 to 30 minutes, with a warm-up exercise and recap of what was covered in the previous session. Review the homework, if assigned.

If this is the only module being conducted on this day, plan a closing activity of about 15 minutes to summarize what has been learned, solicit questions and feedback from the participants on the day’s activities, and to get a sense of how participants are feeling. A sample evaluation form is provided on page I.17.

If Module 4 will be conducted more than one day from now, consider assigning homework—a practice activity based on this module’s content—for participants to work on until the next meeting.

Activity 3.1

Copy Handout 15, “If You Had a Choice,” for all participants.

Activity 3.2

Clear enough space in the middle or along one wall of the room so participants can position themselves along an imaginary continuum. It may help to lay down a line of tape from one end of the room to the other. If the room is not large enough to allow everyone to move around freely, you may want to use a hallway.

Have available for this activity the Instructor’s Guide, “Personal Style Continuum Statements” (page 3.13).

Copy Handout 16, “Personal Style Continuum,” for all participants.

Activity 3.3

If there is no co-instructor, ask for a participant volunteer to help you with the demonstration role play in step 1. Explain that he or she will play a mentee who is angry and disrespectful toward the mentor (played by the instructor). A sample role play is provided in the Teaching Tip on page 3.16.

Copy Handouts 17 and 18, “Choosing to Pull Back” and “Pulling Back: When Feelings Get in the Way of Listening,” for all participants.

For step 6, think of times when you've followed option A and option B that you feel comfortable sharing with participants.

For step 9, think of examples of pull-back strategies that have worked well for you in professional and personal situations.

For step 13, think of situations that provoke you emotionally, to help explain Handout 18.

Prepare a flip chart page for step 15, "Instructions for Pairs Work."

—Teaching Notes—

—Teaching Notes—

Activity 3.1 Exploring Assumptions

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe how and when they make assumptions about other people; and

Describe the possible impact of making assumptions in a mentor–mentee relationship.

Key Content

- All people make assumptions; this is natural and normal.
- People often make assumptions about others based on limited information. Key factors in these assumptions are stereotypes about age, sex, race, ethnicity, socioeconomic status, sexuality, or appearance. Many times, these initial assumptions are wrong.
- When meeting someone for the first time, a person does not know anything about the new person’s story. He or she may have pieces of his or her story, but until the person begins to give out information, it is not possible to know what is true. To find out what is true, it is important to ask questions, be curious, and confront rumors and assumptions.
- On the negative side, the stories about others that people assume are correct can prevent them from really getting to know an individual. On the positive side, if people are aware of their assumptions, they can ask questions to check the accuracy of their thoughts, thereby opening the conversation and building the relationship.

Activity Steps

Large-group exercise (30 minutes)

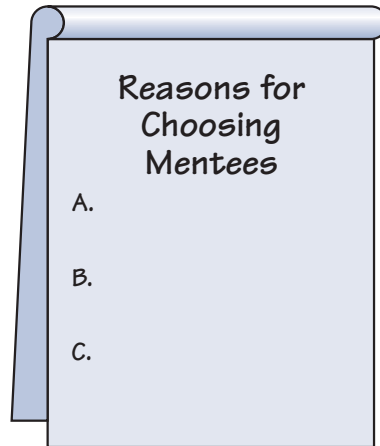
1. Introduce this exercise by noting that it is normal to make assumptions about people, that is, to take small pieces of information and fill in other details based on our past experiences. However, those assumptions, which are often based on beliefs about people of a certain age, sex, race, appearance, or socioeconomic status, are often wrong. Explain that this exercise will explore how this happens by asking participants to pretend they can choose a desirable mentee based on a few simple facts.
2. Distribute Handout 15, “If You Had a Choice.” Ask the participants to read the statements about three potential mentees. Based on the information given, they should number the statements one through three, choosing the person with whom they would most want to work as number one and least want to work with as number three.

– Continued next page

Module 3: Communication Skills #2—Developing Self-Awareness

Activity 3.1, continued

3. After 2 minutes, ask participants to raise their hands if mentee A was their first choice. Ask for volunteers to share what drew them to placing this mentee first. On a flip chart page entitled “Reasons for Choosing Mentees,” note their reasons for choosing mentee A.



4. Do the same for mentees B and C.

5. Then reveal to the participants that the statements were written about the same mentee. Ask participants:

How can these statements be about the same person?

6. Explain that these statements are examples of information that might be gained at different points in a relationship or from different sources. Emphasize that when people first meet, they don't know each other's whole story. Each may have pieces of the other's story, but until a person confirms it, what's really true isn't known.

7. Refer back to the flip chart page with the list of reasons for choosing a mentee. Ask participants to identify assumptions that were made and that are reflected in their reasons. Ask participants:

Which assumptions were true? Which were not?

How can you check or clarify your assumptions?

► Teaching Tip

At this point, participants may assume this exercise is supposed to teach that assumptions are bad. Be clear that making assumptions is normal and natural, regardless of whether they turn out to be right or wrong. The goal is to become more aware of assumptions and work to clarify or confirm them—as discussed in the next step.

8. Explain that assumptions may be right or wrong, but they are guesses based on only a little information—e.g., someone is a young mother, therefore she may be overextended or unreliable. In order to check if assumptions are true or false, the first step is to become aware of them. The second step is to explore the assumptions by asking the mentee questions that invite the mentee to share his or her own perspective—e.g., “Having young children and a job can be challenging—how are you doing with all of this?” Asking questions is a good way to clarify information and check assumptions.

9. Summarize by concluding that people generally relate to others based on what they already know—or what they think they know. Since the mentor is responsible for initiating the relationship with the mentee, it is important to learn the mentee’s story by building a relationship and learning directly from her or him, rather than making assumptions.

—Teaching Notes—

—Teaching Notes—

Activity 3.2: Personal Styles

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe four basic categories of personal style;

Describe their own personal style in terms of these categories;

Explain that differences in personal style are not right or wrong;

Explain how differences in personal style can lead to wrong assumptions and judgments about another person's behavior; and

Explain how being aware of differences in style can help them relate better to their mentees and avoid negative judgments about them.

Key Content

- Each person has a particular *personal* style that describes how he or she sees the world, approaches challenges or new situations, and communicates with others. Generally, people assume everyone sees and experiences the world as they do. It is important for peer mentors to understand the differences between their own and their mentees' personal styles and to recognize that there is no right or wrong personal style.
- Being aware of one's own personal style is important to effective communication. Once peer mentors are aware of their own styles, they can change their approach and communicate more effectively with mentees whose styles are different from their own.
- This model presents four dimensions of personal style, with a continuum of individual characteristics for each dimension:
 - Introvert/Extrovert;
 - Big-Picture Oriented/Detail-Oriented;
 - Feeler/Thinker; and
 - Present Oriented/Future Oriented.

Activity Steps

Large-group exercise (50 minutes)

1. Note that, in addition to examining our assumptions about people, it is also useful, when relating to others, to become more aware of “personal style.” Explain that “personal style” refers to how people see the world and how they act or behave in different situations. When working closely with other people—whether mentees or consumers—it is useful to know one's own personal style and how to work with people whose styles are different from one's own.

– Continued next page

Module 3: Communication Skills #2—Developing Self-Awareness

Activity 3.2, continued

2. Explain that participants will first explore this concept through a large-group exercise. Ask everyone to stand and move to the cleared space in the room (see Advance Preparation). Explain that you will read two statements that describe two nearly opposite ways of behaving. If participants relate completely to one statement, they will go to one end of the space. If they relate completely to the other, they will go to the other end. If they feel sometimes one way and sometimes the other, they will stand somewhere in the middle. It's important to note that there are no right or wrong answers to this—just different ways of behaving. (Note that, after they do this one time, it will make a lot more sense.)

3. Referring to the Instructor's Guide: "Personal Style Continuum Statements" (p. 3.13), read the first two statements—"I prefer to work alone" and "I prefer to work with others." Point to where participants should stand if they agree completely with the first statement and where they should stand if they agree completely with the second. People who do not agree completely with either statement should stand somewhere in between.

4. After everyone has taken a position, confirm that the people at the ends of the continuum are where they want to be. Then establish a place roughly midway between the two ends, which is for people who relate equally to both statements. Check in with those in the middle: if they relate somewhat more to one statement than the other, they should reposition themselves a bit closer to the appropriate end.

► Teaching Tip

You may or may not want to use the word "continuum." If you do, point out how people are spread out in an imaginary line between the two statements. The range of opinions from those who agree totally with one statement to those who agree totally with the other represents the concept of "continuum." The important point is to recognize that some people relate strongly to one statement, others relate strongly to the other, and still others will be somewhere in between. No position is right or wrong.

5. Repeat this process with the next two sets of statements. Then point out that the statements on one side generally describe a personal style called "introvert," while those on the other side describe a style called "extrovert." Note how many people were somewhere in between the two ends. Remind participants that there are no right or wrong styles and that most people are a combination of introvert and extrovert. (A handout distributed at the end of the activity will remind them of these concepts.)

6. Repeat the process with the next personal style category, and then summarize for "big-picture oriented/detail oriented." Do the same for "feeler/thinker" and "present oriented/future oriented."

► Teaching Tips

Allow time for informal discussion as people place themselves. More time may be needed if participants already know each other, as they are likely to begin discussing who belongs where. This can be a valuable part of the exercise. Ultimately, however, each participant decides for him- or herself where to stand on the continuum.

Keep the tone light, allowing people to change their minds about where they place themselves, and to tell brief stories about how their personal style has played out in their lives. The stories will most likely be about interactions with family or colleagues that they now understand differently.

Also, encourage people at opposite ends of the continuum to describe what it feels like to be in a room with their opposites. Keep the tone light and guard against blaming and judging. Help participants see that working and communicating with people with styles opposite to their own requires making adjustments.

Remind participants that each person is unique and that the activity is designed to give them insight into their own and others' ways of being in the world. No place on the continuum is right or wrong, or better or worse. The goal is for participants to better understand themselves and others and to appreciate how they might have emotional responses to or make judgments about others whose styles are different from theirs.

► Training Option

If some participants are not able to move easily around the room, this exercise can also be done on a flip chart page. Draw a line from one edge of the page to the other to represent the continuum. Ask participants one at a time to help place themselves on the continuum by instructing you where to place their initials, as you read the relevant statements. Point to the center of the line, and have each participant tell you where to write his or her initials by saying, "more to the left [or right], more, more...there."

Discussion (10 minutes)

7. Ask participants (see Key Content for points to cover):

How do you think knowing this information about yourself will help you be a more effective peer mentor?

What will it be like to mentor someone whose style is different from yours? What strategies might you use?

8. Distribute Handout 16, "Personal Style Continuum," and note that trainees can refer to it later on to remind themselves of what they experienced and discussed in the large-group exercise, and to consider what personal style categories colleagues, friends, or mentees might fall under.

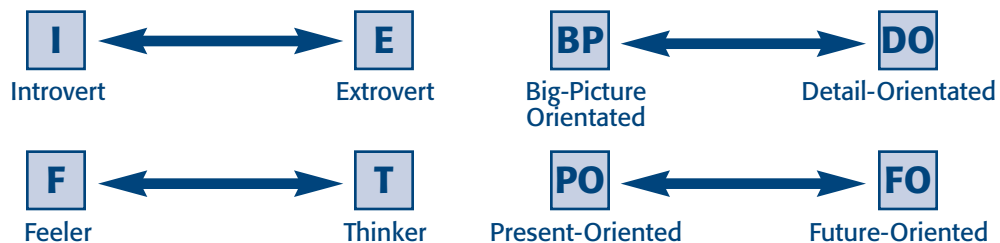
—Teaching Notes—

—Teaching Notes—

Instructor's Guide 3.2: Personal Style Continuum Statements

I	I prefer to work alone.	↔	I prefer to work with others.	E
I	I am more comfortable with a few close friends than at a big party.	↔	I am very comfortable at large parties and other social situations.	E
I	When I have a problem, I think inwardly to solve it.	↔	When I have a problem, I talk about it with others.	E
BP	I get bored with details and facts.	↔	I pay close attention to detail and need to know facts.	DO
BP	I make decisions quickly.	↔	I make decisions after pondering all the angles.	DO
BP	I am very disorganized.	↔	I am very organized.	DO
F	I shy away from, or am uncomfortable with, conflict.	↔	I have tolerance for some conflict.	T
F	My decisions are influenced by emotions and feelings.	↔	My decisions are influenced by facts and logic.	T
F	My opinions are swayed by emotional argument.	↔	My opinions are swayed by reason, rationale, and data.	T
PO	My social activities are usually spur of the moment.	↔	My social activities are usually planned.	FO
PO	Change is exciting to me.	↔	Change is a bit scary to me.	FO
PO	I think mostly about today.	↔	I think a lot about the future.	FO

Key



—Teaching Notes—

Activity 3.3: Pulling Back

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe how emotional responses often get in the way of their ability to listen attentively;

Explain that pulling back from their emotional responses often leads to more effective communication; and

Identify strategies for pulling back from their emotional responses.

Key Content

- When people are faced with situations or people who provoke an emotional response, listening can become difficult and communication often becomes charged. While people rarely have control over others' words or behavior, each person can control his or her own emotional responses to a situation. Shifting personal internal responses makes it possible to listen more attentively. The resulting communication is more effective and more positive.
- “Pulling back” requires gaining control of yourself in an emotionally stressful situation. The steps of pulling back are to:
 - Notice your internal reaction and judgments;
 - Freeze your reaction—and put it aside; and
 - Put your attention back on the other person.
- Clear and objective thinking is especially important in peer mentoring and leads to good communication and problem solving. Pulling back allows a person to think more clearly (i.e., not get caught up in an emotional reaction), listen more effectively, and thus better understand what was said.
- Pulling back from a mentee's emotionally charged statements, followed by paraphrasing, will allow a mentor to gain emotional control of him- or herself and open up the conversation instead of shutting it down.
- Pulling back from an emotional response does not mean being soft or allowing dishonest workers to get away with something. In fact, using pull-back strategies makes it much less likely that a peer mentor will be misled or manipulated. Maintaining objectivity allows for keener listening and fuller exploration of the situation with the mentee.

Activity Steps

Demonstration role plays and discussion (10 minutes)

1. Note that, in spite of our best efforts to explore assumptions about our mentees and consider the impact of differences in personal style, there may be times when we find it difficult to stay calm when talking with a mentee. Explain that you will now conduct a brief role play to demonstrate one such situation. Ask the participant volunteer (see Advance Preparation) to come forward. Introduce yourself as the peer mentor and your assistant as the mentee, and conduct the first role play.

► Teaching Tips

The first role play demonstrates a situation in which a mentee says something inappropriate to the peer mentor, who reacts very emotionally, thereby aggravating the situation. An example is provided below; however, instructors should tailor the role play to situations known to be problems for participants.

Sample scenario: The peer mentor sees the mentee walking down the street and says, “Hello—how are things going?” The mentee shouts angrily, “Why are you always in my face? I didn’t ask for a mentor, you know. Why don’t you just leave me alone?” The startled peer mentor shouts back, “Well, believe me, I didn’t ask to have you as a mentee. I’ll just tell your supervisor how you feel and let her deal with you.”

2. Ask participants:

What did you observe about the peer mentor’s response to the worker?

What is the likely outcome for the mentor and mentee’s relationship?

How could the peer mentor have responded differently in order to get a better, more productive outcome?

3. Repeat the role play, with the mentee exhibiting the same behavior and the peer mentor demonstrating a pull-back technique and several of the participants’ suggestions about how to better respond to the situation.

► Teaching Tips

Examples of the peer mentor’s response could be to take a deep breath, and paraphrase what the mentee said, e.g. “It sounds like you are very upset with me.”

The instructor should exaggerate the pull-back strategy because, in general, people are not aware of someone pulling back. However, in a demonstration role play, it should be very obvious.

4. Ask participants:

What did you observe this time about the peer mentor’s response to the mentee?

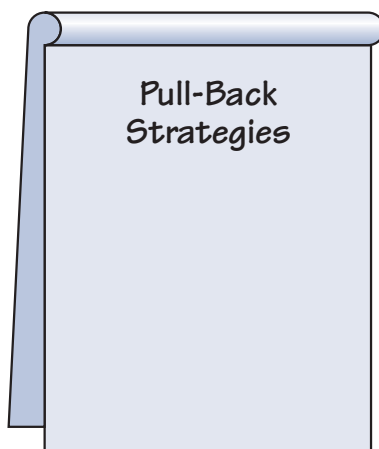
What is the likely outcome for the mentor and mentee’s relationship?

Interactive presentation (15 minutes)

5. Remind participants that, as demonstrated in the listening and paraphrasing activities, people listen well when they bring their full attention to a conversation. However, having an emotional response to a speaker, or to his or her words, is one of the most powerful blocks to listening. Discuss the first bullet in Key Content about the importance of managing one's own internal responses in order to listen effectively.
6. Distribute Handout 17, "Choosing to Pull Back." Review the first page, describing option A and option B, and applying them to the demonstration. If helpful, add personal examples (see Advance Preparation).
7. Ask participants: What does each option generally lead to? After several responses for each option, turn to page 2 of the handout ("Option A/B Generally Leads to..."), and discuss.
8. Turn to page 3 ("'Pulling Back' Means"). Reinforce the meaning of "pull back" and the steps. Ask participants for examples from their work experience when they might need to pull back and gain control over their emotions.

Brainstorming and discussion (15 minutes)

9. Explain that people use multiple strategies to pull back in stressful situations. The goal of this activity is for participants to become aware of the strategies they use and strengthen them and to learn new strategies. Briefly give examples of pull-back strategies that have worked for you, professionally and personally.
10. Ask the group to brainstorm different strategies for pulling back. Write the strategies on a flip chart page. List the examples you gave to get things started.



► Teaching Tips

The list could include: take deep breaths, silently say a prayer, silently count to five, and silently say a personal affirmation such as "I have the strength to deal with whatever is happening here."

Some strategies may not be appropriate responses to stressful situations (for example, walking away). Redirect or reframe these responses before writing them on the flip chart page.

—Continued next page

Module 3: Communication Skills #2—Developing Self-Awareness

Activity 3.3, continued

11. Explain to the group that there are two categories of pull-back strategies. The first are strategies that people use immediately, or in the moment, when they are having an emotional response. The second category's strategies are ones people use when they know they are about to be in a potentially stressful situation, such as a difficult meeting or phone conversation, but there is time to prepare.

12. Quickly review the list from step 10, and ask participants to identify which strategies are immediate, or in the moment, and which ones are preparatory. Label each strategy with an "I" or a "P." Some strategies will work well in either instance.

► Teaching Tip

Examples of preparatory strategies include: vent or talk to a coworker about the situation, listen to soothing music, and imagine yourself staying calm and collected during the situation. Some strategies may belong on both lists.

Individual exercise, pairs work, and discussion (20 minutes)

13. Distribute Handout 18, "Pulling Back: When Feelings Get in the Way of Listening." Read through it together, explaining that these are examples of personal or workplace situations in which a person might need to pull back. Use examples from your own life to help participants understand what you mean and to model self-reflection and self-disclosure.

► Teaching Tips

The first images that come to mind when someone says, "What provokes you?" tend to be very strong and are directly useful in this pull-back activity. "Provoke" is intentionally used here to bring to mind previous emotionally charged situations. These images provide excellent learning resources that participants can draw on to answer the questions:

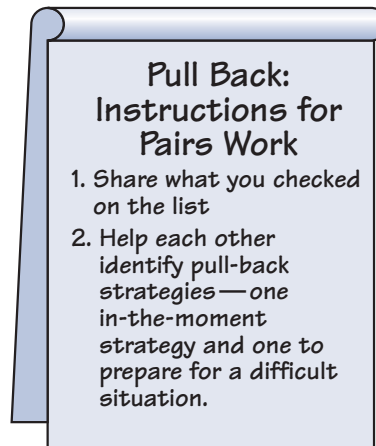
What, if anything, helped you pull back in that situation?

If you were in that situation again, what would your pull-back strategy or strategies be?

Point out to participants that anger is not the only emotion that gets "provoked"—sadness, discouragement, helplessness, joy, and excitement are other feelings that are sometimes triggered. It is necessary to pull back from any of these emotions if the intention is to listen well.

14. Ask participants to take a few minutes, individually, to check off those items on the list that resonate with them and add others they have previously encountered. Explain briefly that, to control one's emotions, one must first become aware of them. Most of the time, specific situations or people provoke certain emotions in a person. Identifying such situations in advance will help in pulling back when the mentors actually encounter the situations.

15. Divide participants into pairs. Post the prepared flip chart page, "Instructions for Pairs Work," and ask them to take 10 minutes to share the items they checked on the list and help each other identify pull-back strategies.



16. After 10 minutes, return to the large group and ask one member of each pair to briefly note the items that provoked them and the pull-back strategies they identified. Ask for one item and strategy from each group, and keep going around the room until all the strategies have been noted. Add any strategies not listed earlier to the brainstorm list (from step 10).

► **Teaching Tip**

Participants cannot go into great detail about things that provoke them emotionally. Help them stick to summarizing their stories and focusing on pull-back strategies.

17. Thank participants for their efforts, and note that they will have a chance to practice pulling back in the next module.

—Teaching Notes—

—Teaching Notes—