Module 5
Problem Solving

Goal

- To practice an approach to problem solving that involves seeing the problem from several points of view, identifying important factors related to the problem, and considering a range of options that might lead to a satisfactory solution.

Time

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

Activities	Methods	Time
5.1 The Role of a Peer Mentor—Revisited	Discussion	15 minutes
5.2 Exploring Options: Part 1	Interactive presentation, brainstorming, discussion	75 minutes
Break		15 minutes
5.3 Exploring Options: Part 2	Small-group work, discussion	60 minutes

Supplies

- Flip chart, markers, and tape
- Paper and pencils
- Instructor's Guide: Exploring Options (p. 5.13)

Handouts

- Handout 3: "The Role of a Peer Mentor"
- Handout 24: "The Exploring-Options Approach to Problem Solving"
- Handout 25: "Important Factors"
- Handout 26: "Exploring-Options Worksheet" (residential and home care versions)

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 6 will be conducted more than one day from now, consider assigning homework—i.e., a practice activity based on this module's content—for trainees to work on until the next meeting.

Activity 5.1

Make extra copies of Handout 3, "The Role of a Peer Mentor" (from Module 1), in case some participants have misplaced theirs.

Prepare a flip chart page for step 2 listing the roles of a peer mentor already covered, with enough space in between to write participants' examples for each one.

Have available the flip chart page created in Activity 1.3, step 8: "How could an experienced worker have helped?"

Prepare a flip chart for step 7 with the three remaining roles of a peer mentor.

Activity 5.2

Review the Instructor's Guide, "Exploring Options," and Handout 25, "Important Factors," with a senior administrator of the organization(s) that employ the participants, to make sure that the factors and scenarios comply with standards and policies of the organizations.

Prepare flip chart pages for steps 4, 8, and 9.

Copy Handouts 24 and 25, "The Exploring-Options Approach to Problem Solving" and "Important Factors," for all participants.

Activity 5.3

Review Handout 26, "Exploring-Options Worksheet," either the residential or home care version, with a senior administrator of the organization(s) that employs the participants, to get a sense of the factors and outcomes that would comply with standards and policies of those organizations.

Copy Handout 26 for all participants.

Activity 5.1: The Role of a Peer Mentor—Revisted

15 minutes

Learning Outcomes

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

Give examples of how to carry out the roles of a peer mentor, applying what they have learned in the training thus far; and

Identify which roles they will continue to work on in the remainder of the training.

Key Content

- Thus far, the training has addressed five roles of the peer mentor, as described in Activity 1.3: modeling good caregiving skills and effective communication skills, supporting mentees, providing current information to mentees about job responsibilities and the workplace, and giving constructive feedback.
- The rest of the training will focus on the remaining three roles—demonstrating good problem-solving skills, demonstrating a person-centered focus, and helping mentees develop problem-solving skills.

Activity Steps

Discussion (15 minutes)

1. Ask participants to retrieve Handout 3, "The Role of a Peer Mentor" from their binders, or provide copies for those who cannot find the handout. Note that the workshop has already covered a lot of material and they are nearing the end of the initial phase of training, which encompasses modules 1-6. Now is a good time to look back and review what has been learned so far and map out what is ahead.

2. Post the flip chart page with the first five roles of a peer mentor listed. Point out the topmost ray in the handout, "models good caregiving skills." Remind participants that they were selected to be in the training because they already have good caregiving skills—they would not be here if they didn't. Ask:

How can you model good caregiving skills for mentees?

What are some opportunities to do this?

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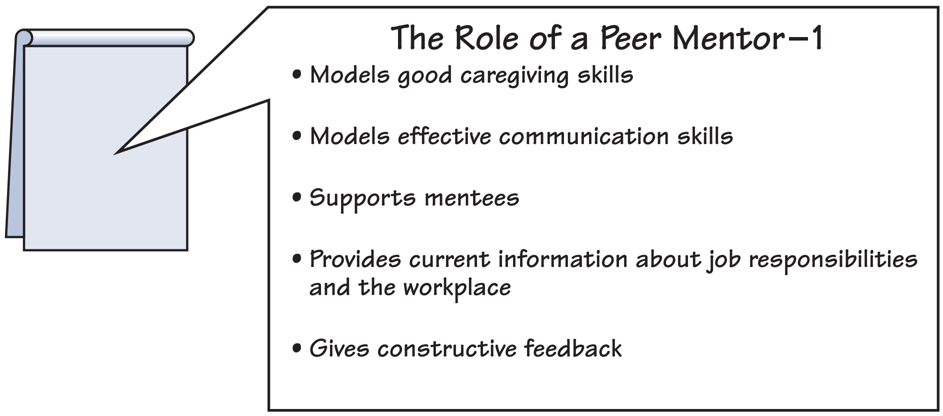
Activity 5.1, continued

Summarize and write their responses in the space under that role on the prepared flip chart page.



3. Move to the next role, "models effective communication skills." Ask:

What communication skills have we covered so far?

How can you use these with mentees?

Write their answers on the flip chart page.

4. Continue to the next role, "supports mentees." Ask:

How do you support mentees on the job?

What can you do to make them feel welcome from the beginning?

How can you make them feel confident and certain about what they do?

Summarize their responses on the flip chart page. Remind participants of Activity 1.3 (steps 3-8), in which they recalled their first week on the job and what helped or would have helped (if it had been available) in their first weeks and months on the job. Retrieve the flip chart page from step 8, review the responses, and add any not already discussed to the list under "supports mentees."

5. Continue to the next role, "provides current information to mentees about job responsibilities and the workplace." Explain that this is one of the specific ways that mentors can help mentees when they first begin work. Ask:

What are some things that took time to figure out when you first started working here?

Refer to any examples in the previous step that might be relevant here. Examples might include time clocks, lunch and smoking breaks, locations of supplies, in-services, paychecks, procedure for requesting time off, etc. Write responses on the flip chart page.

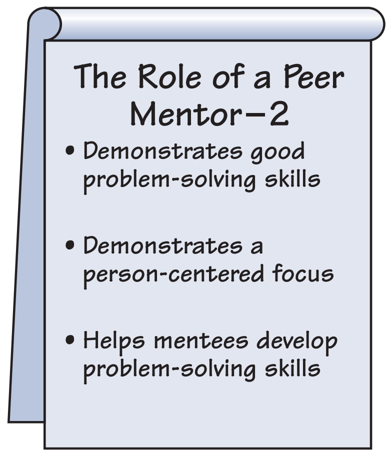
6. Move to "gives constructive feedback to help mentees succeed," As a review, ask:

What are the two key elements of constructive feedback?

How does constructive feedback help a mentee succeed?

Write their answers on the flip chart page.

7. Point out that, up to now, they have been reviewing things already discussed in the training and that the other roles will be covered in the remainder of the training. Post the second flip chart page, and continue around the perimeter of the graphic to the next role, "demonstrates good problem-solving skills." Note that it is likely that they already have good problem-solving skills—that is partly why they were selected for training. Today they will be discussing an approach to problem solving that will help them to understand the process better and may strengthen their skills as well. Write "Module 5" in the space below this category on the flip chart page.



8. Move to "demonstrates a person-centered focus." Ask:

What does "person-centered care" mean to you?

What are some ways that you deliver person-centered care?

How can you share with a mentee the ways in which you honor consumers' preferences and decision making?

Note that honoring the consumers' preferences and decision making is central to good caregiving. This is also an important principal in the problem-solving approach participants will learn today. This approach starts with exploring any problem from three points of view: that of the person receiving care, the direct-care worker (i.e., the mentee), and the organization. Respecting the consumers' point of view when addressing a problem is another way of making your care-giving "person-centered." This approach to problem solving will be explored further in Module 7. Write "Modules 5 and 7" under this category on the flip chart page.

9. Finally move to the last role, "helps mentees develop problem-solving skills." Remind participants that Module 5 will define and clarify one problem-solving approach that they will have a chance to put into practice as soon as they start mentoring. Later on, they will help mentees use this approach to develop their own problem-solving skills. Write "Module 7" under this category on the flip chart page.

10. Conclude the review by explaining that they will now begin learning about the next role of a peer mentor, "demonstrates good problem-solving skills."

—Teaching Notes—

Activity 5.2: Exploring Options—Part 1 75 minutes

Learning Outcomes

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

List the main steps in a problem-solving approach that explores options in order to come to a satisfactory resolution;

Define the desired outcome of this approach to problem solving;

Explain how examining important factors related to a problem helps to determine a solution that meets the needs of all parties involved—in this case, the consumer, the direct-care worker, and the organization; and

Explain why it is crucial to identify more than one possible option for addressing a problem.

Key Content

- Exploring options, as an approach to problem solving, is a step-by-step tool for analyzing a problem and identifying possible solutions.
- The main steps in the exploring-options approach are:
  - Clearly state the problem, from the vantage points of the consumer, the direct-care worker, and the organization;
  - From each point of view, identify the important factors related to the problem;
  - Brainstorm options for addressing the problem; and
  - Select the option, or combination of options, that best addresses the important factors, and thus, all points of view.
- For work-related problems encountered by the direct-care worker, there are usually three points of view—that of the consumer, the direct-care worker, and the health care organization providing the service. These viewpoints are shaped by important factors—issues such as the health, safety, and rights of the consumer and the direct-care worker and the legal and ethical responsibilities of the health care organization.
- The desired outcome of this approach to problem solving is to identify an option, or a combination of options, that takes into account all the important factors and, thereby, addresses the problem from all three points of view. Most often, a combination of options provides the best solution.
- Identifying all the important factors in a problem situation is not easy. It requires focus, clear thinking, and adequate information. Sometimes these factors conflict with one another—for example, a diabetic consumer's right to eat whatever he or she wants vs. an organization's responsibility to promote the consumer's health.

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Activity 5.2, continued

- After identifying the important factors, brainstorming options (i.e., actions the direct-care worker can take) that address each factor allows for consideration of a wide range of approaches to the problem. A key rule is to identify at least one option for each important factor.
- Consciously identifying multiple options before deciding how to address a problem increases the chances that the solution ultimately selected will succeed in achieving the desired outcome. And if the first option does not work, the mentee is already prepared with a second option.

Activity Steps

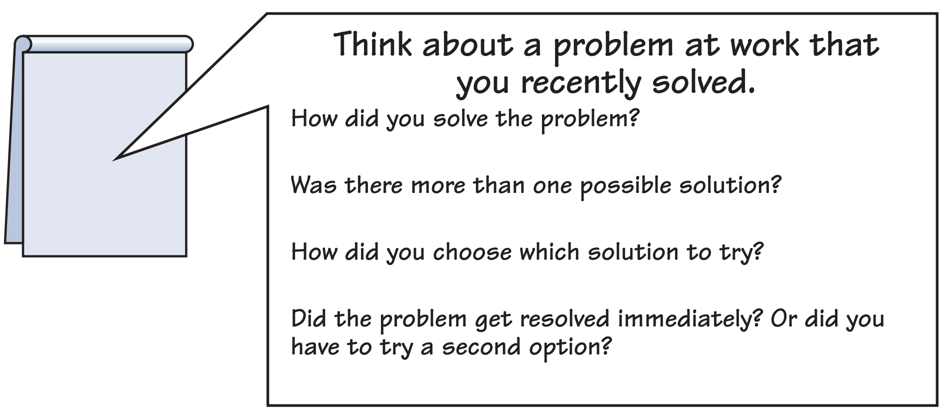
Interactive presentation (45 minutes)

1. Note that helping mentees to solve problems will definitely be a part of participants' work as mentors and will require all the knowledge and communication skills they have been working on throughout this training. In addition, it requires an awareness of how to approach problem solving, in order to be able to help mentees strengthen their skills.

2. Explain that in Module 7, participants will practice helping mentees solve problems. In this module, they will examine problem solving itself—taking a process they probably already do automatically, and breaking it down into steps—with the goal of better understanding the steps and thus being better able to guide a mentee through the steps.

3. Since participants were selected for this training, they have most likely demonstrated good problem-solving skills on the job. Ask participants to think about a work-related problem they recently encountered and successfully solved.

4. Post the prepared flip chart page and ask participants to take a few minutes to consider the problem they solved and to jot down some responses to these questions.

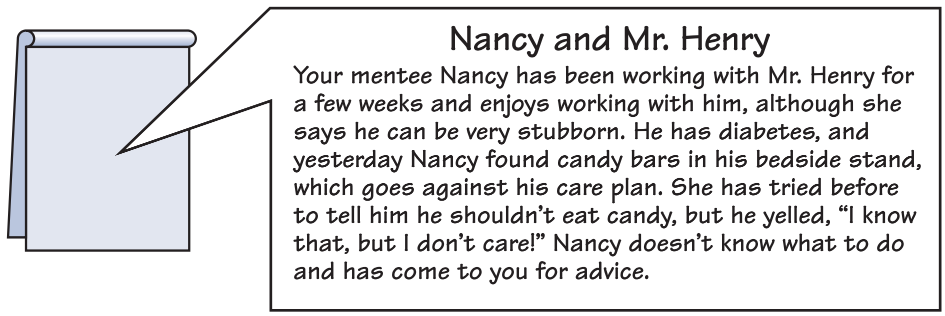


5. After 2 minutes, ask for a volunteer to share his or her problem and solution by briefly stating the specific problem (without names) and then answering the questions. Allow as many participants to share as time allows.

6. Thank the participants for sharing their problem-solving approaches. Explain that there are many approaches to problem solving, and the one used in this training is called "exploring options." This technique involves analyzing the problem from different perspectives, identifying and exploring options for solving the problem, considering the likely outcomes or results, and then choosing the option with the best chance of satisfactorily solving the problem. After learning this approach and trying it out with their own problems, they will be better able to help mentees use this approach.

7. Distribute Handout 24, "The Exploring-Options Approach to Problem Solving." Read through the handout together and explain that a case scenario will illuminate many of the aspects of this approach.

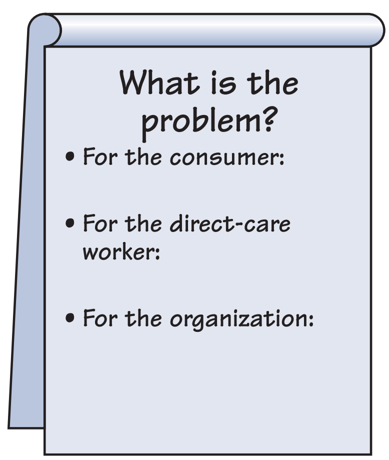
8. Post the prepared flip chart page with the case scenario for Nancy and Mr. Henry from Instructor's Guide, "Exploring Options" (page 5.13), and read it aloud.



9. Ask participants:

What is the problem in this situation?

After a few responses, post the prepared flip chart page and ask follow-up questions to make sure the problem is considered from the points of view of the consumer, the direct-care worker, and the organization. Write the three problem statements generated by participants on the flip chart page.



Teaching Tip

The Instructor's Guide, "Exploring Options," gives a sample of ideas that fit this case scenario. These are not necessarily the right responses. Be open to other ideas from participants and use the Instructor's Guide to help you ask questions that will make sure key issues are addressed during the discussions.

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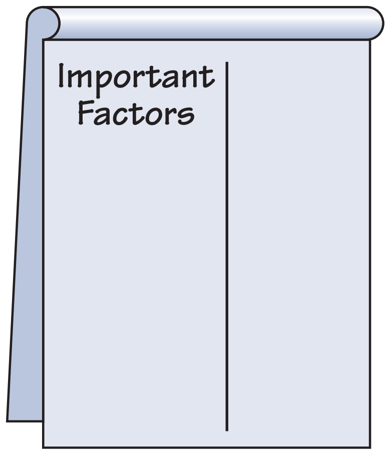
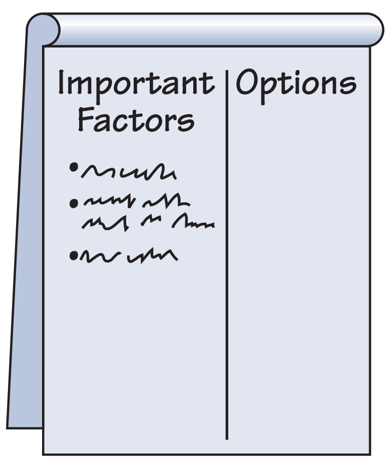
Activity 5.2, continued

10. Distribute Handout 25, "Important Factors" and review the list. Depending on the situation, some factors will be more important than others, and some may not even need to be addressed. Make two columns on a sheet of flip chart paper, and write the heading "Important Factors" over the left column. Considering all three points of view in the problem for Nancy and Mr. Henry, ask participants to identify which factors apply to this case scenario. Write their responses in the left column.



Brainstorming (10 minutes)

11. Write "Options" at the top of the right column on the flip chart page. Remind participants that options are possible solutions to the problem. Ask the group to brainstorm options that address each of the important factors they listed. The goal is to come up with as many options as possible, including at least one for each factor. Some options may address more than one factor. Encourage participants to be creative and think outside the box; sometimes thinking of ideas that are not realistic allows people to see possibilities that were not obvious. Write the ideas on the flip chart page.



Teaching Tip

If participants really think outside the box, they may come up with some silly and potentially dangerous options. Keep the tone light and note the options, but make sure there is a good selection of realistic ones.

Discussion (20 minutes)

12. After participants have suggested at least six options, explain that in order to select the best option for solving a problem, they will assess what is likely to happen as a result of each option. Then they will determine which option (or combination of options) best addresses the problem from all three points of view.

13. Ask participants:

> *What would be the impact (both positive and negative) of each option on each of the important factors we listed?*

14. Ask participants which options have a positive impact on two or more of the important factors. Put a check mark next to those options (see the Instructor's Guide).

15. Considering the checked options, determine which one (or which combination) comes closest to solving the problem from all three points of view—the consumer's, the direct-care worker's, and the organization's. Write "Plan A" in the margin next to that option or options. Note that the solution that most fully addresses the important factors also most effectively addresses the problem from the perspectives of every party involved.

Teaching Tip

Sometimes one option creates a situation in which the interests of the consumer, the direct-care worker, and/or the organization are in conflict. For example, in the case of Mr. Henry, one option is to allow him to eat the sweets. This respects the consumer's right to choose what he wants *but* it places the consumer's health in jeopardy *and* would put the organization's reputation for promoting health in jeopardy if the direct-care worker simply responded to what the consumer wanted.

Therefore, a more balanced solution for the direct-care worker would be a combination of options that addresses all three points of view—i.e., allow Mr. Henry to eat the candy, *and also* try to educate him about the dangers involved in this choice, *and* report to the nurse/organization that he is not following his diet.

16. Note that since participants have come up with more options than the ones they selected for Plan A, they could easily come back to their list to consider other options if Plan A does not work.

17. Return to Handout 24, "The Exploring-Options Approach to Problem Solving." Review the handout, recalling the case scenario of Nancy and Mr. Henry to illustrate the points.

Teaching Tip

Applying the exploring options approach to problem solving is continued with small group work in Activity 5.3, Exploring Options: Part 2. Some questions about the basic steps can be answered during this review of Handout 24, but others can probably be deferred to Activity 5.3.

—Teaching Notes—

Instructor's Guide 5.2: Exploring Options

Nancy and Mr. Henry. Your mentee Nancy has been working with Mr. Henry for a few weeks and enjoys working with him, although she says he can be very stubborn. He has diabetes, and yesterday Nancy found candy bars in his bedside stand, which goes against his careplan. She has tried before to tell him he shouldn't eat candy, but he yelled "I know that, but I don't care!" Nancy doesn't know what to do and has come to you for advice.

1. State the problem from each point of view:

For the consumer:

Mr. Henry wants to eat candy bars, and the direct-care worker won't let him.

For the direct-care worker:

Nancy is supposed to follow the care plan, which says Mr. Henry should not eat candy bars, but he won't listen to her.

For the organization:

It wants to respect Mr. Henry's rights but also doesn't want him to become ill.

2. Important Factors:

Check those factors that apply.

- ☑ Client safety
- ☐ Infection control
- ☐ Client care
- ☑ Client rights
- ☐ Cultural respect
- ☑ Role of the caregiver
- ☑ Following organizational policy
- ☐ Caregiver safety
- ☐ Personal situation

3. Options:

List at least one possible solution for each point of view and for each checked factor.

- Let Mr. Henry have all the candy he wants.
- Explain again to Mr. Henry why candy is unhealthy for him. *[Plan A]*
- Substitute less concentrated sweets for the candy bars.
- Help Mr. Henry decide to eat something else.
- Watch Mr. Henry and keep taking the candy away.
- Report to his nurse that he's not following his care plan. *[Plan A]*
- Ask a family member to convince him to stop eating candy.

—Teaching Notes—

Activity 5.3: Exploring Options—Part 2 60 minutes

Note: *This activity is a continuation of Activity 5.2. Therefore, the Learning Outcomes and Key Content are the same.*

Activity Steps

Small-group work (45 minutes)

1. Explain that participants will now practice applying the exploring-options approach to a different situation. Divide participants into groups of three or four. Distribute Handout 26, "Exploring-Options Worksheet" (see Advance Preparation). Read the case scenario out loud and ask if there are any questions about the situation. Then ask participants to work in their groups on step 1—state the problem (from all three points of views)—and step 2—important factors. Ask them to choose a recorder for their group, who will write the group's answers on his or her handout.

Teaching Tip
An advantage of having all groups work on the same case scenario is seeing the different approaches people take to solving the same problem.

2. Come back to the large group after 15 minutes of small-group work, and ask the recorders to share how their groups stated the problem from all three points of views. Note the similarities and differences in the way the groups viewed the problem.

Teaching Tips
Oftentimes, participants will have difficulty seeing the problem from the consumer's perspective or the organization's. It is important for the instructor to help participants appreciate the different points of view of the problem, because these conceptualizations will influence the important factors and, thus, the options and solution.

At the same time, direct-care workers sometimes take on the problems of the organization or the consumer as their own problems. It is also important to clearly define the direct-care worker's problem and what he or she can actually do about the situation.

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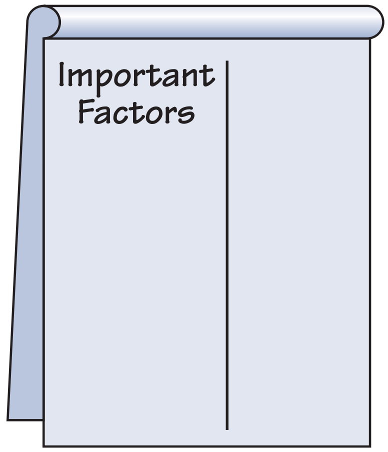
Activity 5.3, continued

3. As before, make two columns on a flip chart page, and label the left column "Important Factors." Ask each group what they identified as important factors in this situation and why, and list their responses, noting similarities and differences.

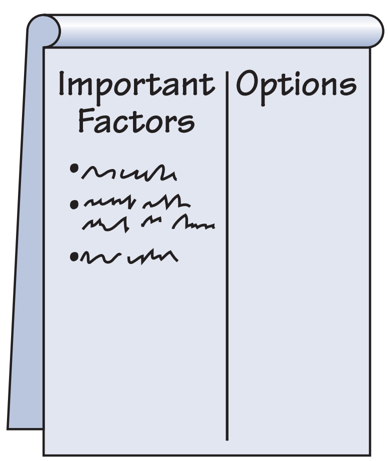


Teaching Tip

Some of the important factors will be the same for the different viewpoints. List each factor just once, and label the points of view in parentheses at the end.

4. Ask participants to return to their small-group work, and brainstorm all possible options for addressing this problem. A recorder should write down their ideas. Encourage them to be creative and try to identify more than one option for each important factor listed on the flip chart page.

5. Reconvene the group after 10 minutes, and ask the recorders to take turns sharing their group's options. Start with the first important factor listed in the left column, and ask for options the groups identified to address this factor. Write these in the right column, under "Options," next to the important factor. Since you encouraged them to be creative, there are no wrong answers for the brainstorming. (Unworkable ideas will be addressed in the next steps.)



Discussion (15 minutes)

6. Ask participants:

What would be the impact (both positive and negative) of each option on each of the important factors we listed?

7. Ask participants which options have a positive impact on two or more of the listed important factors. Put a check mark next to those options.

8. Considering the checked options, determine which one (or which combination) comes closest to solving the problem from all three perspectives—the consumer's, the direct-care worker's, and the organization's. Write "Plan A" in the margin next to that option (or options). Note, again, that the solution that most fully addresses the important factors will also most effectively address the problem from all three points of view.

9. Note that participants have now applied the exploring-options approach to problem solving to a case scenario. Ask them to think back to their own approach to problem solving. Ask:

How is this approach similar to or different from what you have done?

10. Explain that this approach can be applied to any personal or work-related problem. Remind participants they will have an opportunity to practice helping mentees with this approach in Module 7. Emphasize that, in the meantime, it is important for them to practice this approach when faced with a problem situation in or out of work. Practicing will help them become more adept at using this process and thereby strengthen their ability to support mentees.

—Teaching Notes—

—Teaching Notes—

Module 6
Establishing Effective Relationships with Mentees

Goal

- To set the stage for establishing supportive relationships with mentees by exploring risk-taking in relationships and how to apply communication skills in first interactions with mentees.

Time

2 hours, 45 minutes (3 hours, 15 minutes, with opening activity)

Activities	Methods	Time
6.1 Finding Common Ground: Personal Risk-Taking and Self-Disclosure	Large-group exercise, interactive presentation	30 minutes
6.2 The First Connection	Discussion, brainstorming, role plays	90 minutes
Break	*[May be taken during Activity 6.2]*	15 minutes
Closing Activity		30 minutes

Note: We recommend that trainees start mentoring after completing Module 6. However, if participants are expected to begin mentoring sooner than that, the curriculum should be revised so that Activity 6.2, "The First Connection," is the last session conducted before they do so.

Since it is expected that participants will start peer mentoring after this module, time is allotted for a 30-minute closing activity. See Advance Preparation for topic ideas.

Supplies

- Flip chart, markers, and tape
- Paper and pencils
- Activity 6.1 Instructor's Guide: "Stand Up and Take a Risk!" (p. 6.9)
- Activity 6.2 Instructor's Guide, "First Connection Situations" (p. 6.17)

Handouts

- Handout 3: "The Role of a Peer Mentor"
- Handout 27: "Stages of Self-Disclosure"
- Handout 28: "Personal Conversation Openers"
- Handout 29: "Door Openers and Closers"
- Handout 30: "Peer Mentor Log (sample)"

Advance Preparation

Prior to the first meeting between mentors and mentees, the organization should conduct an orientation for mentees that explains the nature of the mentor–mentee relationship and key issues such as the types of support mentees can expect, the scheduling of mentor–mentee meetings, the difference between a mentor and a supervisor or trainer, etc. Since information for mentees is not covered in this curriculum, check to see that that meeting has been held or has been scheduled.

Review all training and presentation materials for each activity.

If this module starts a new day in the training, prepare a flip chart page with the day's agenda, and post it where it can remain throughout the day. Also 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.

Since this module is likely to be the last before participants begin peer mentoring, the closing activity should be longer, at least 30 minutes, to leave time for questions, evaluation, and a celebration of the completion of this part of the training. A formal graduation may be scheduled at this time or after Module 8 to publicly acknowledge participants' new roles within the organization.

Activity 6.1

Review the statements in the Instructor's Guide, "Stand Up and Take a Risk!" (page 6.9). Determine if any need to be revised to suit your participants, and add new statements if needed. Since there may not be time to use them all, select several from each category that will resonate for participants in this exercise.

Copy Handout 27, "Stages of Self-Disclosure," for all participants.

Activity 6.2

Copy Handouts 28, 29, and 30—"Personal Conversation Openers," "Door Openers and Closers," and "Peer Mentor Log"—for all participants. (If mentors will be using a different log sheet, use it in place of Handout 30.)

Discuss logistical issues with the peer mentor program manager, in order to explain the following: when mentees will be assigned to the peer mentors, how the mentors will be notified, to whom they will report and how often, and any other logistical issues or questions that have come up during the training. Find out what kind of log sheet or other record-keeping will be required and obtain copies for the participants (if not already distributed).

If possible, the peer mentor program manager should attend the last part of "First Connection" and the closing celebration. Notify him or her of the appropriate time and location, and, if available, ask him or her to present the information noted in the previous bullet.

—Teaching Notes—

—Teaching Notes—

Activity 6.1: Finding Common Ground—Personal Risk-Taking and Self-Disclosure

30 minutes

Learning Outcomes

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

Describe how it feels to risk sharing something personal in a group;

Describe three stages of self-disclosure and how the peer mentoring relationship can evolve through these stages; and

Describe the peer mentor's role in establishing the level of self-disclosure by taking risks in sharing.

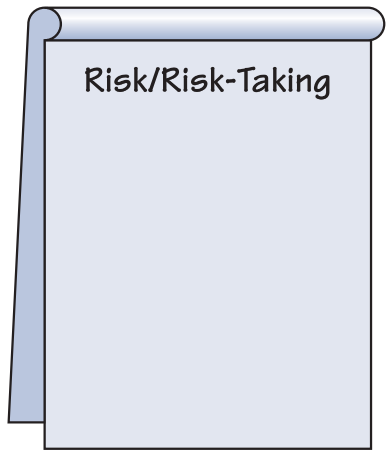
Key Content

- "Risk" generally refers to a situation involving some chance of loss, hurt, or damage. For many people, sharing (or disclosing) information about themselves feels risky. In non-intimate relationships, "taking a risk" can mean saying or doing something that may cause another person ultimately to end a relationship or—in the case of coworkers—may result in an uncomfortable work situation.
- By modeling appropriate risk-taking when sharing information about him- or herself (self-disclosure), the mentor can help establish common ground with the mentee, which is an important step in building supportive relationships.
- The peer mentor establishes the level of self-disclosure in the mentee–mentor relationship by being the first to share information or feelings. Generally, the mentee will mirror the mentor's level of self-disclosure.
- Self-disclosure can be described in stages. A meaningful mentor–mentee relationship will likely begin with disclosure of facts (Stage One), move into thoughts and feelings (Stage Two), and ideally grow into here-and-now communication (Stage Three) as the peer mentor demonstrates competence and fosters the mentee's sense of safety. Since Stage Three disclosure involves higher risk, it requires building trust over time.
- Stage Three here-and-now disclosure may involve both the work situation and some personal details of the mentor's and mentee's lives. Finding the right balance of self-disclosure is an ongoing dynamic of any mentor–mentee relationship, as it includes both establishing trust and maintaining professional boundaries.

Activity Steps

Large-group exercise (15 minutes)

1. Distribute Post-It notes or index cards to participants, and ask participants to write the word or phrase that comes to mind when you say "risk" or "risk-taking." Have them post their notes on a flip chart page at the front of the room, with the words "Risk/Risk-Taking" written at the top.



2. Read the phrases aloud and summarize the meaning of "risk" for this group (or ask a participant to do so). If necessary, add elements from the first bullet in Key Content to complete participants' understanding of risk in the context of work relationships.

3. Have participants form a circle with their chairs, so they can see each other. Explain that this exercise is called "Stand Up and Take a Risk!" as it involves sharing information about themselves in a large group. Explain that you will read a series of statements, which may or may not apply to participants. After each statement is read, participants for whom that statement is true should stand up, thereby sharing something about themselves with the rest of the group. Note that each person has the right to share only what he or she is comfortable sharing, but everyone is encouraged to take a risk.

4. Begin by reading the low-risk statements and asking people to stand up if the statement applies to them. Progress into the medium- and high-risk categories, with periodic brief discussions based on your observation of changes in behavior.

Teaching Tips

As you get into medium-risk statements, people's behavior will change: fewer will stand, some will rise slowly or reluctantly, and more will look around to check out who is standing before making a decision about whether to stand.

When you notice shifts in behaviors, use those changes as points of brief discussion, keeping in mind that talking about what made a participant stand or hesitate to stand may pose an additional risk.

Be sensitive to the comfort level in the room, and stop reading statements when no one is standing anymore. It's not necessary to read all the high-risk statements. The point is to have participants experience a range of risk, not to make people uncomfortable.

Acknowledge the courage it takes for people to stand when they feel they are taking a risk in sharing something personal.

5. When all the statements have been read (or you get to several statements where no one is standing), ask all the participants:

How did it feel to stand when the low-risk statements were read and a lot of people stood up? When the medium- and higher-risk statements were read, and fewer people stood?

How did it feel to be sitting while others were standing? Are there any particular statements that stand out?

What exactly were you risking when you chose to stand up?

Why might someone take the risk of sharing personal information about themselves?

Teaching Tips
Points to cover in the discussion include:

- As the statements progressed, they increased the risk of sharing. For example, it is easier to share that you have a dog than to share that you have felt like quitting your job or you have had financial difficulty.
- As the level of comfort and closeness with a person or group increases, it's often possible to share information that may seem more risky.
- The perceived risk of sharing certain information may vary for people of differing cultural, ethnic, religious, or family backgrounds.

Interactive presentation (15 minutes)

6. Thank everyone for taking risks and sharing what they did. Note that they will now consider risk taking in the context of the mentor–mentee relationship. Ask participants what risks might be involved in their work as peer mentors.

7. Ask participants what "self-disclosure" means to them. Distribute Handout 27, "Stages of Self-Disclosure." Review the three stages.

8. Facilitate a discussion covering the Key Content by asking participants:

Which stage would best describe the communication between a peer mentor and mentee? Why?

Who do you think is more responsible for setting the stage of self-disclosure in the mentor–mentee relationship? Why?

How do you think a mentor's self-disclosure may help to build feelings of emotional safety or security for the mentee?

How much personal detail is necessary to share between peer mentor and mentee?

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Activity 6.1, continued

Teaching Tip

Self-disclosure by the mentor can help increase a mentee's feelings of emotional safety or security by:

- Letting the mentee know that the mentor has been through similar situations and challenges;
- Showing that the mentor shares similar thoughts and feelings and thus empathizes with the mentee's situation; and
- Reinforcing for the mentee that the mentor is also a peer.

In addition, by sharing information about him- or herself, the mentor demonstrates trust in the mentee and models the appropriate level of sharing for building the mentor–mentee relationship.

9. Summarize by thanking participants again for taking risks. Explain that they will now consider the role of self-disclosure in initiating and building supportive relationships with their mentees.

—Teaching Notes—

Instructor's Guide 6.1: Stand up and take a risk!

Low risk

- I love the color red.
- I have a dog or cat.
- I hated school.
- I love children.
- I am happily married.
- I am a grandmother.
- I was not born in the United States.

Medium risk

- I get stressed easily.
- I am nervous about being here.
- I have a stressful relationship with my mother or father.
- I sometimes feel overwhelmed by trying to balance work and family.
- Sometimes I don't feel respected at work.
- I have been divorced.
- I hate getting dressed in the morning because nothing ever fits.

High risk

- When I first started working here, I made some mistakes.
- I wanted to leave this organization at one time.
- At some point in my life, I had such money problems that I couldn't make ends meet.
- I really don't like these kinds of exercises!
- I am not sure if I will make a good peer mentor.

—Teaching Notes—

Activity 6.2: The First Connection

90 minutes

Learning Outcomes

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

Discuss the use of self-disclosure and open-ended questions to initiate a comfortable first connection with mentees;

List some key topics and questions for the first interaction with a mentee;

Demonstrate how to approach the first meeting with a mentee; and

Maintain a log describing their contacts with mentees.

Key Content

- The most important task of the first meeting between a mentor and a mentee is to create an atmosphere that allows each one to learn about the other and to start to establish a relationship. Too much emphasis on job responsibilities in this first meeting runs the risk of missing an opportunity to begin building a supportive relationship and establishing trust.
- The mentor–mentee relationship is unique but has familiar elements. A mentor's part in the relationship blends aspects of professionalism similar to the relationship between a worker and a consumer and personal aspects similar to relationships with friends. The work-related aspects include being responsible to the consumer and the organization, while the personal aspects include being supportive and helping the mentee to solve his or her own problems.
- The mentoring relationship is one of support, not supervision; both mentor and mentee should understand that the mentor is not the supervisor and has no direct authority over the mentee. Even in those instances in which a mentor may carry out one aspect of a supervisory role, such as assessing the new worker's caregiving skills and knowledge, the mentor's role is intended to be more a coach than an evaluator.
- As the mentee may be unfamiliar with the mentor program and the culture of the organization, it is the peer mentor's responsibility to set the tone for the new relationship to be built. An appropriate level of self-disclosure is important to encourage sharing, without intimidating the mentee by sharing too much too soon.
- Explaining the importance of confidentiality while also making clear what information a mentor is required to share with others in the organization is important to establish clear expectations for the new mentor–mentee relationship.
- The communication skills of active listening, paraphrasing, and asking open-ended questions are especially important in the first meeting in order to learn about the mentee and encourage the mentee's questions.

Activity Steps

Discussion (15 minutes)

1. Ask participants to describe what they typically discuss during a conversation with a new consumer. Ask:

How do you begin the conversation?

What do you talk about?

How do you try to establish a comfortable working atmosphere with that individual?

2. Ask participants next to talk about how they build a new personal relationship. Ask:

How do you begin a conversation?

What do you talk about?

How do you establish a comfortable atmosphere?

How is that different from initiating a relationship with a consumer?

3. Ask participants:

In what ways do you think building the mentor–mentee relationship is similar to starting a relationship with a consumer?

How is it different?

In what ways is it similar to starting a relationship with a friend?

How is it different?

4. After a few responses, affirm that building the mentor–mentee relationship is a blend of building a relationship with a consumer and with a friend (see the second bullet in Key Content).

5. Note that mentees, who are often new to an organization, may see mentors as supervisors, which they are not. It is important for mentors to be aware of this potential confusion and to clear it up when it happens. Ask participants:

What are some things a mentor does in her relationship with a mentee that may resemble a supervisory relationship?

In what ways is the relationship different from a supervisory relationship?

Teaching Tips

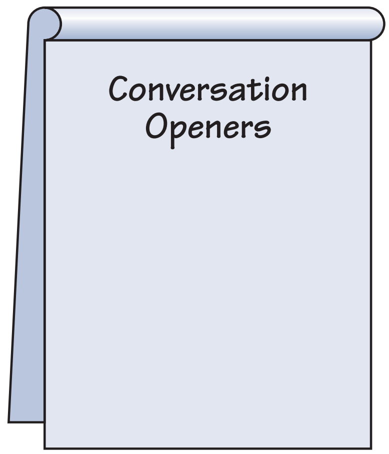
What a mentor can and cannot do that may resemble supervision depends on the organization's vision for the mentor. In many organizations, a mentor's responsibilities may include giving feedback, listening, guiding, answering questions, and reinforcing or assessing personal care and clinical skills.

In most organizations, responsibilities for assigning tasks, scheduling work assignments, conducting formal evaluations, documenting performance problems, hiring, and firing are reserved for supervisors.

The importance of differentiating between a mentor's role and a supervisor's role will be covered in more detail in Module 8.

Brainstorming and discussion (20 minutes)

6. Ask participants to brainstorm what professional and personal topics they might discuss with a mentee in their first meeting, to begin a conversation and make the mentee more comfortable. Write the responses on a flip chart page titled "Conversation Openers." Note that the first meeting will be about both the mentor and the mentee.



7. Distribute Handout 28, "Personal Conversation Openers." Ask participants to take a few moments to think about what particular personal information they would like to share with a mentee in the first conversation and to write down at least two things on the worksheet. Have them refer to the brainstorming list from step 6 for ideas, if necessary.

8. Have participants refer back to Handout 27, "Stages of Self-Disclosure," about the three levels of self-disclosure. Note that the mentor is responsible for beginning the personal sharing and setting the example of the appropriate level of self-disclosure. Ask participants:

What level of self-disclosure might be appropriate for the first meeting? Why?

9. Note that in the beginning of the relationship, it is important to describe the role of the peer mentor. In addition to explaining the roles noted in Handout 3, this would also be a good time to clarify how the peer mentor differs from the supervisor, and to discuss confidentiality and its limits. Confidentiality means keeping personal information shared by the mentee private. However, the mentor is, at times, required to share certain kinds of information with others in the organization—for example, if information learned is not something the mentor can handle herself.

Teaching Tip
Sharing information learned from the mentee with others in the organization is covered in detail in Module 8. However, to establish a relationship built on trust, it is important before the mentee starts sharing to explain that some information may have to be passed on, either by the mentee or by the mentor, particularly regarding situations that put the consumer, the mentee, or other employees at risk or have the potential to harm the employer.

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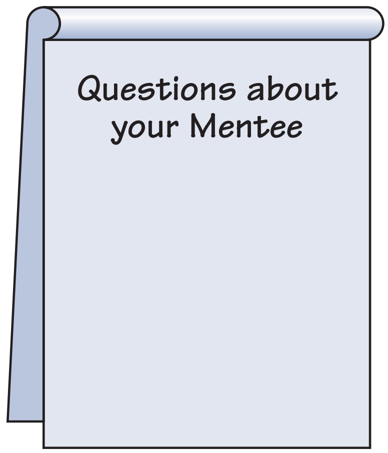
Activity 6.2, continued

10. Next, move on to discussing what participants would like to learn about their mentees. Ask participants:

What specific questions can you ask to find out more about your mentees?

Note their responses on a new flip chart page entitled "Questions about Your Mentee." Again, refer to the brainstorming list from step 6 for ideas, if necessary. Encourage them to make the questions open-ended whenever possible.



11. Distribute Handout 29, "Door Openers and Closers." Quickly review the three types of questions or comments. Ask:

How do these different types of questions open doors in a conversation or close them?

Which type of questions would work best in meetings with your mentees, and why?

12. Ask participants to look at the list of questions they brainstormed in step 10. Ask them to identify any that are door openers, door closers, or dead ends. For the door closers and dead ends, ask how to change the questions into door openers.

13. Ask participants to write at least two questions on Handout 28 that they would feel comfortable asking in the first meeting with a mentee.

Role plays and discussion (25 minutes)

14. Explain that you will now conduct a demonstration role play of a first interaction (see Instructor's Guide: "First Connection Situations," page 6.17). Play the role of the mentee, and ask for two participants to volunteer to try out their approaches (self-disclosure and asking open-ended questions) to starting a conversation. The task is to initiate the conversation and see how much they are able to learn from the mentee in 5 minutes.

15. Ask for a first volunteer. Read aloud one of the sample situations from the Instructor's Guide. End the role play after 5 minutes.

16. Ask for another volunteer to try his or her approach. Either repeat the same scenario or choose a second sample situation and read it aloud. Role-play for about 5 minutes.

Teaching Tip

Choose either to repeat the same situation or use the second one, depending on the degree to which the first volunteer successfully connected with the mentee.

Continue with additional role plays as time allows, repeating the sample scenarios or creating new ones that use situations similar to those mentors may encounter when they begin mentoring.

17. Thank the volunteers for their efforts. To debrief, ask the following questions. For each question, ask the volunteer who played the role of mentor to respond first, then ask the other participants for feedback.

What did the "mentor" do well?

What would you do differently to strengthen the first connection?

Discussion (30 minutes)

Teaching Tip

If possible, include the peer mentor program manager or other staff involved in the peer mentor program during this part of the activity. Introduce them to participants and invite them to join the discussion.

18. Distribute Handout 30, "Peer Mentor Log," or the actual log sheet that the organization has designed for peer mentors to record their contacts with mentees. Review the log sheet and confirm that participants understand what information is requested. Ask the program manager to explain the expectations and logistics of completing the logs—e.g., when, where, and how to submit the logs. For the box "Improvement Opportunity," read the footnote aloud. Explain that this will be covered in more detail in Module 8, and completing this section of the form is optional until that time.

19. Discuss any additional logistical issues related to starting their mentoring. Possible topics include: a review of the goals of the mentoring program, organizational policies and procedures related to mentoring, pay increases, when mentors will be assigned to mentees and how they will be informed, to whom mentors will report and how often, plans for the booster modules, and any remaining questions and concerns. If the program manager is present, invite him or her to lead this discussion.

20. Congratulate participants on completing this part of the training, and prepare for the closing celebration!

—Teaching Notes—

—Teaching Notes—

Instructor's Guide 6.2: First Connection Situations

Home Care

- Mary began working with your agency three months ago, before the peer mentor program began. Since she finished her training, she's been working replacement cases mostly—on average 20-24 hours a week. Lately, she's been turning down cases, and the coordinator is concerned she might be getting discouraged and has asked you to give her a call.
- You are assigned to Rita, who recently completed her training and just received her first client. Although she successfully completed the training program, Rita had several absences during training that were excused due to emergency family situations. The training staff has suggested that you stay in frequent contact with Rita to provide support and help Rita maintain a strong connection with the agency. They hope your contacts with Rita will help avoid possible problems with attendance once she starts working.

Residential Care

- Tyler is an experienced CNA who just starting working at your nursing home. This is the third nursing home he's worked at since completing his CNA training three years ago. The staff educator mentioned that Tyler seemed to have difficulty understanding some of the key personnel policies and procedures during the daylong orientation. Tyler has been assigned to shadow you during your shift tomorrow and will be one of your regular mentees.
- Erika has just completed the Red Cross CNA training program and found work at your nursing home through the Internet. This is her very first CNA job, and the HR director says she seems anxious and "rough around the edges." In the interview, Erika mentioned that this job is extremely important to her because it is the first step she is taking toward getting her own apartment again and regaining custody of her two young children. You have been asked to shadow Erika during her shift to provide orientation support.

—Teaching Notes—

Module 7
Assisting Mentees in Problem Solving

Goal

- To prepare mentors to help mentees develop their problem-solving skills by applying the exploring-options approach.

Time

3 hours (4 hours with opening and closing activities)

Activities	Methods	Time
7.1 Supporting the Mentee in Problem Solving: Introduction	Demonstration role play and discussion	30 minutes
7.2 Asking Open-Ended Questions—Part 2	Small-group work, discussion	30 minutes
Break		15 minutes
7.3 Assisting the Mentee in Exploring Options	Pairs work, discussion	60 minutes
7.4 Supporting the Mentee's Right to Decide	Discussion	45 minutes

Supplies

- Flip chart, markers, and tape
- Paper and pencils

Handouts

- Handout 19: "Open-Ended Clarifying Questions"
- Handout 21: "Closed vs. Open-Ended Questions"
- Handout 24: "The Exploring-Options Approach to Problem-Solving"

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Modulue 7: Introduction, continued

- Handout 31: "Role Play: Telling vs. Exploring" (home care and residential versions)
- Handout 32: "Scenarios for Open-Ended Questions"
- Handout 33: "Exploring-Options Scenarios and Worksheet" (residential and home care versions)

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 session.

Plan an opening activity of about 30 minutes, with a brief warm-up exercise and a discussion of participants' experiences as peer mentors since the last meeting. The objectives are to share their successes, to identify specific challenges (particularly as related to helping mentees solve problems), and to highlight other issues mentors have encountered so those concerns may be addressed in this module.

Plan a closing activity of about 30 minutes, to solicit feedback, discuss concretely how to apply what they have learned and to be sure that the issues identified in the opening activity have been addressed. A sample evaluation form is provided on page I.17.

Activity 7.1

Choose either the residential or home care version of Handout 31, "Role Play: Telling vs. Exploring," and make four copies for the players.

Activity 7.2

Make several copies of Handouts 19 and 21, "Open-Ended Clarifying Questions" and "Closed vs. Open-Ended Questions," for participants who cannot locate theirs, to refer to in step 1.

Copy Handout 32, "Scenarios for Open-Ended Questions," for all participants.

Create a flip chart page with the heading "Open-Ended Questions" for step 4.

Activity 7.3

Make extra copies of Handout 24, "The Exploring-Options Approach to Problem Solving," for participants who do not have their resource binders with them.

Choosing either the residential or home care scenarios, make copies of Handout 33, "Exploring-Options Scenarios and Worksheets" for all participants. (Alternatively, you may choose to make up your own scenarios from issues that participants discuss in the opening activity.)

Prepare a flip chart page, "Exploring Options with a Mentee," for step 6.

Activity 7.4

Create a flip chart page with the headings "Feelings and Reactions," "Respecting and Accepting the Mentee's Choice," and "Maintaining the Mentor–Mentee Relationship" for step 5.

Activity 7.1: Supporting the Mentee in Problem Solving: Introduction

30 minutes

Learning Outcomes

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

Explain how telling mentees what to do in problem situations limits the ability of mentees to develop and strengthen independent problem-solving skills;

Describe the role of the peer mentor in helping mentees solve problems; and

Explain how helping mentees explore options empowers them.

Key Content

- Participants were selected to be peer mentors because they are skilled caregivers and problem solvers. As good problem solvers, mentors will naturally want to help mentees solve their problems. However, trying to solve problems for mentees is different from guiding or assisting mentees in figuring out their own solutions. Peer mentors need to be aware of this difference and focus on helping mentees develop their own problem-solving skills.
- It is important to avoid the temptation to simply offer solutions. What works for one person in one situation may not work the same for someone else, even in a similar situation. Simply speaking out of one's own experiences and telling a mentee what to do in a given situation is often not the best approach. Mentors will be more effective if they teach mentees to use the exploring-options approach to problem solving.
- People become empowered when, with assistance, they are able to solve their own problems and take responsibility for their own decisions. They are then able to learn from the experience of what worked and what didn't and apply what they learned to future situations.

Activity Steps

Demonstration role play and discussion (30 minutes)

1. Explain that this module, like Module 5, addresses problem solving but here the focus is on how to help others solve problems. Remind participants that they were chosen to be peer mentors because of their caregiving and problem-solving skills. Ask:

What is the difference between helping someone solve a problem and solving it for them?

2. After a brief discussion, ask for four volunteers to act out a scripted role play. Explain that the role play will illustrate some of the challenges in helping mentees with problem solving. The instructor will be the narrator. Distribute Handout 31, "Role Play: Telling vs. Exploring" (residential or home care version), and give the volunteers a few moments to read and mentally prepare for their parts.

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Activity 7.1, continued

3. Point out a stage area somewhere in the room, and ask the actors to stand to the side of that area. Explain that they will enter the stage after the narrator announces the scene and introduces their characters. (Stage instructions are easily followed in the script.) Conduct the role play.

4. After the role play, thank all the volunteers. Debrief by asking the following questions:

How did Robin try to help Dana with her problem?

What happened when Dana followed Robin's advice?

How typical is Robin's approach to helping Dana solve her problem? Why do we tend to help people solve problems in this way?

Reflecting on this role play, what do you think is the difference between helping someone solve a problem and solving it for them?

Teaching Tips

Robin's basic approach was to give advice to Dana, based on what has worked for her in the past, rather than helping Dana figure out her own solution. Robin's solution to the problem may have worked for her, but it did not go well for Dana.

Acknowledge that this approach is very common and is often the only form of help many people have experienced.

Participants should understand that Robin's advice did not work out well for Dana and should recognize that a different approach to helping someone solve problems is more appropriate for peer mentoring.

5. Note that it is typical of people in the helping professions to want to solve problems for other people, sometimes by suggesting solutions that have worked for them. Ask:

How is helping someone solve their own problems more empowering for them than just suggesting a solution?

How could Robin have helped Dana solve her own problem?

Teaching Tips

The goal here is to have participants realize that by helping mentees use the exploring-options approach learned in Module 5, they will enable mentees to find their own solutions to problems. This approach empowers mentees.

In the role play just finished, if Robin had guided Dana in using the exploring-options approach, Dana would have considered the problem from the points of view of Angie, Angie's son, and the agency, and might have come to a different perspective on the nature of the problem.

6. Summarize by noting that a key role of peer mentors is to help mentees solve problems on their own, learn strategies to apply in future situations, and take responsibility for their actions. Trainees will have a chance to practice helping mentors solve problems later in this module.

Activity 7.2: Asking Open-Ended Questions—Part 2

30 minutes

Learning Outcomes

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

Create open-ended questions that will help them maintain supportive mentor–mentee relationships and help the mentee address problems.

Key Content

- As discussed earlier, asking open-ended questions is a skill that enables a listener to learn much more from the speaker than closed questions allow. In peer mentoring, this can be especially useful in first connecting with a mentee and in addressing problem situations.
- By using open-ended questions, a mentor is able to explore what a mentee is thinking, feeling, or experiencing.
- Open-ended questions are more efficient than closed questions in exploring problems with the mentee, because the mentor avoids wasting time asking a lot of questions that may provide only limited information or that may miss the mark entirely.
- Used together, open-ended questions and constructive feedback can greatly enhance communication and are keys to successful peer mentoring because:
  - They allow for more complete understanding of a mentee's concerns and feelings; and
  - They set the stage for appropriate, efficient, and effective problem solving.

Activity Steps

Small-group work (15 minutes)

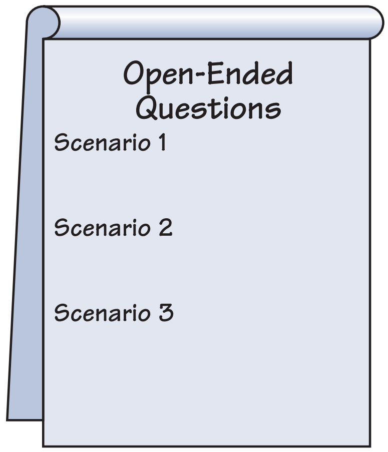
1. Note that helping a mentee solve his or her own problems requires all the communication skills learned earlier in the training. In helping a mentee explore options for solving a problem, asking open-ended questions is particularly useful. Review the concept of closed vs. open-ended questions from Activity 4.1, referring to Handouts 19 and 21, "Open-Ended Clarifying Questions" and "Closed vs. Open-Ended Questions," as necessary.

2. Divide participants into groups of three and separate the groups from one another. Explain that everyone will be working on the same three short scenarios. The objective is to create open-ended questions to use in a conversation with a mentee.

3. Distribute Handout 32, "Scenarios for Open-Ended Questions." Note that situations similar to those in the handout might come up for them when mentoring. Give the groups about 10 minutes to generate questions for all three scenarios.

Discussion (15 minutes)

4. Read the first scenario aloud. Ask one group to read one of its questions, and write it on the flip chart page you've prepared with the heading "Open-Ended Questions." Ask another group to read one of its questions for the same scenario; continue until all the groups have listed their questions to help the mentee talk about her situation.



5. After all the questions for the first scenario have been listed, review each one to check that it is open-ended. If not, ask for suggestions on how to make it open-ended. Rewrite the question as necessary on the flip chart page.

6. Repeat this process for the remaining two scenarios.

Teaching Tip
If participants have grasped how and when to ask open-ended questions, ask for volunteers to role-play the second and third scenarios in the large group. After each role play, ask other participants to identify the open-ended questions and describe what effect the open-ended questions had on the interaction between the mentor and mentee.

7. Ask participants to summarize what stands out for them about using open-ended questions to explore problems a mentee might be having. Guide the discussion to cover the information contained in Key Content.

—Teaching Notes—

Activity 7.3: Assisting the Mentee in Exploring Options

60 minutes

Learning Outcomes

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

Explain in detail the peer mentor's role in helping mentees solve problems, and the advantages of helping mentees solve their own problems rather than telling them what to do;

Explain the importance of active listening, paraphrasing, asking open-ended questions, and pulling back when helping mentees to solve problems;

Demonstrate the exploring-options approach to helping a mentee solve a problem; and

Demonstrate providing constructive feedback to other participants.

Key Content

- One key role of the peer mentor is to facilitate problem solving by mentees. Thus, the mentor will need to be familiar with the exploring-options problem-solving approach learned in Module 5 and be able to guide mentees through the approach.
- The communication skills developed earlier in the training—active listening, paraphrasing, asking open-ended questions, pulling back, and giving constructive feedback—are critical for obtaining complete information from a mentee and guiding him or her through the problem-solving process.
- Supporting mentees in problem solving empowers mentees. If mentees explore options and choose one, even if it's not the best choice, they learn from the experience. If mentees simply accept and apply a solution offered by someone else, they learn only that it worked for one person in one situation and that it may or may not have in their own case. They may not know why the solution worked or didn't and therefore may not be able to adapt the solution to different situations in the future.
- Helping someone solve their problems does not mean the mentor can never give advice. The mentor's perspective and experience can be valuable ingredients in the problem-solving process. However, it is important that the mentor's ideas are offered in the context of exploring possible options.

Activity Steps

Discussion (10 minutes)

1. Review Handout 24, "The Exploring-Options Approach to Problem-Solving," reminding participants of the case scenarios they used to apply this approach in Module 5 and the three points of view (consumer, direct-care worker, and organization) that are considered in this approach.

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Activity 7.3, continued

2. Ask participants if anyone had an opportunity to practice this approach with one of their own problems in the past month, and ask them to describe how it went.

3. Thank participants for sharing. Explain that the goal of this activity is to help peer mentors develop skills to guide mentees through the exploring-options approach, in order to help mentees develop their own problem-solving skills. Ask participants:

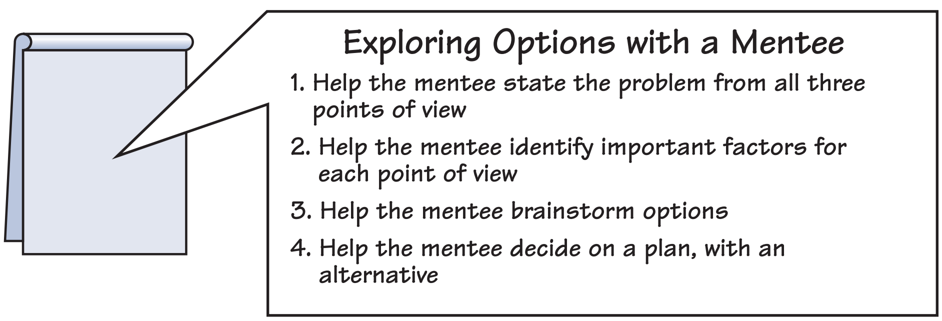
> *Which communication skills can mentors draw on to help mentees use the exploring-options approach? [asking open-ended questions, using active listening, paraphrasing, pulling back, providing constructive feedback]*

Pairs work (25 minutes)

4. Explain that participants will practice helping a mentee use the exploring-options approach by role-playing in pairs using case scenarios. Put the participants in pairs and have them sit as far from other pairs as possible.

5. Distribute Handout 33, "Exploring-Options Scenarios and Worksheet" (see Advance Preparation), and explain that participants will prepare for and role-play two conversations between a mentor and a mentee, using the handouts as guides. Explain that they will have 10 minutes for each role play.

6. Post the prepared flip chart page, and briefly review the steps they'll take.



7. Have participants decide who will be the mentor for each scenario. Give them five to seven minutes to review both case scenarios and to (individually and separately) jot down notes on the scenario handout as follows:

- For the *mentee* role: identify the problem and important factors
- For the *mentor* role: prepare some open-ended questions they'll ask to help their mentee state the problem, identify important factors, and brainstorm options.

Teaching Tip
While pairs are doing this prep work, circulate around the room and check to see that participants understand the scenarios and what they are expected to do in the role plays. Identify any pairs that may need assistance during the role play, so you can return to support them.

8. Begin the role plays. After 10 minutes, ask participants to switch roles and conduct the second role play.

Teaching Tips

If appropriate, consider making one of the following adaptations:

Option 1: If participants are having difficulty with the role play process itself, stop the role after 10 minutes and ask participants to report on how they are doing so far. Give feedback and then finish that scenario together through large-group discussion. Then have them try to do the second scenario in their pairs, with large-group discussion per Step 10, below. (You will not need to do Step 9.)

Option 2: If participants are doing well, but need more time, use the remainder of the 20 minutes for the first scenario. Conduct the large-group discussion per Step 9 for the first scenario. Depending on how much time remains, you can ask one pair to volunteer to do the second scenario as a role play in front of the large group, or discuss the second scenario as a large group, or leave it out and go on to the closing discussion (Steps 12 and 13).

Discussion (25 minutes)

9. Read aloud the first case scenario. Ask all the mentees to report how they stated the problem and to share their plans A and B. Note the similarities and differences among solutions generated by different pairs.

Teaching Tips

Comparing the different versions of plans A and B allows participants to see that there can be more than one approach to solving a problem. The plans should be discussed not in terms of which one is better but which ones more effectively address the important factors from each perspective.

To save time, pairs need not share the important factors and options but only their plans. However, if very different plans A and B are reported, ask that pairs share their important factors and options so other trainees can see how they reached the different choices.

10. Repeat this process for the second scenario.

11. Ask participants who played the mentors in the scenarios to reflect on the process of helping their mentees solve their problem themselves:

In what ways did the mentor help the mentee explore options? [e.g. Guided the mentee to consider different points of view on the problem, probed for specifics by asking open-ended questions, maintained self-control when the mentee got angry, encouraged brainstorming of multiple options, helped the mentee to evaluate the outcomes of different options.]

How is this different from simply telling the mentee what to do?

12. Quickly review the components of "constructive feedback." Have pairs regroup to practice giving constructive feedback to each other on how they did in the mentor role. Stress the importance of commenting on what the mentor did well and what he or she could have done better to help the mentee solve her own problem.

– Continued next page

Activity 7.3, continued

Teaching Tip

Note that this step of constructive feedback is not part of the problem-solving process between a mentor and a mentee. However, they are applying the constructive feedback process here as a way to help each other, as mentors, learn how to better help their mentees.

13. Summarize by reviewing the information in the third and fourth bullets in Key Content, about the importance of supporting mentees in problem solving and how to give advice in the context of exploring options. Note that mentees don't always agree with what mentors think are the best options to solve a problem. The next activity explores what to do in those situations.

—Teaching Notes—

Activity 7.4: Supporting the Mentee's Right to Decide

45 minutes

Learning Outcomes

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

Describe how to present an alternative solution to the mentee's first choice, without telling the mentee what to do; and

Pull back and accept a solution that is not the mentor's preferred choice, with a focus on maintaining the mentor–mentee relationship.

Key Content

- Two important roles of peer mentors are to model effective problem solving and assist mentees in developing problem-solving skills. Sometimes a mentee and a mentor may not agree on the best way to address a situation.
- It is important for a peer mentor to support and respect a mentee's independent problem-solving process and the choices he or she makes—as long as the choice does not harm anyone (this situation is addressed more fully in Activity 8.2, "Pass It On").
- Accepting and supporting a mentee's choice when it differs from one's own is difficult. A mentor must ensure that, even when he or she does not agree with a mentee's choice, the lines of communication remain open. This lets the mentee know that the mentor–mentee relationship is not threatened by a disagreement. To do this well, the mentor must use pull-back skills.
- By maintaining a supportive relationship, even when the mentor disagrees with a mentee's decision, the mentor not only empowers the mentee to make decisions but also makes it easier for the mentee to come back and discuss the outcome of the decision—whether successful or unsuccessful.

Activity Steps

Discussion (45 minutes)

1. Introduce this activity by asking participants if they have ever given someone advice that was not taken. Ask someone to share their experience and answer the following questions:

How did you react when the person chose not to follow your advice?

What happened to your relationship with that person after that experience?

– Continued next page

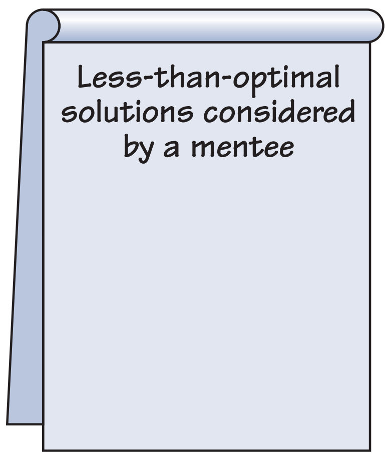
Activity 7.4, continued

Teaching Tip
If participants cannot grasp what you are asking, explain that you are looking for a situation in which they later told the other person (or wanted to tell them), "I told you so!" An example or two from the instructor's experience might be necessary to begin the discussion.

2. Ask if anyone has been in the other role, of not following the advice of someone you respected. Ask what happened to the relationship with that person after that experience.

3. Validate that these experiences—giving advice that was ignored and not following someone else's advice—are likely to have happened to everyone at some time. Discuss the information in the first three bullets in Key Content about the importance of supporting the right of mentees to make their own decisions.

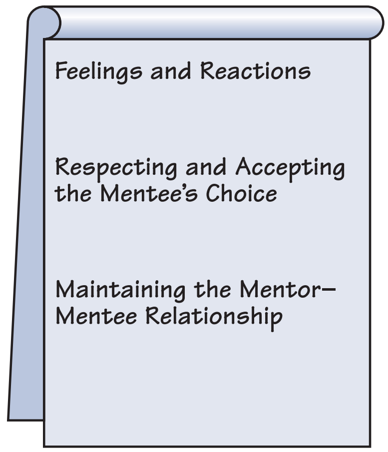
4. Using the case scenario(s) from Activity 7.3, ask participants to identify some options that would not be appropriate in that situation, and write these options on a flip chart page. Ask the group to select one option they really would not agree with, and discuss why.



Teaching Tips
Some options may have the potential to cause harm to either the consumer or the direct-care worker. Note that such options will be addressed in Activity 8.2, "Pass It On," and ask them to select a different option to focus on in this activity.

You may also develop a list of mentee solutions that they could not support based on actual situations and issues participants raised in the opening activity of this module.

5. Ask participants to imagine the mentee has chosen that option and is determined to try it. Using the questions below, divided into three topic areas, lead a discussion about participants' reactions to this decision. List their responses on the prepared flip chart page under the respective headings.



Questions: Feelings and Reactions

What are your emotional reactions to the option?

What feelings may you need to pull back on?

Questions: Respecting and Accepting the Mentee's Choice

How can you suggest an alternative option, without sounding like you are telling the mentee what to do?

What are some ways to say you disagree with a mentee's choice of options but can support him or her in the decision?

Teaching Tips

Examples of responses to the last question include:

I'm not sure I would choose the same option; I'll be curious to know how it works out.

I might do that differently—let me know how it goes.

Although I'd approach it differently, I know you believe this is the best possible solution. Try it and let me know how it works out for you.

Question: Maintaining the Mentor–Mentee Relationship

How can you communicate that you wish to maintain your relationship despite the disagreement?

– Continued next page

Activity 7.4, continued

Teaching Tips

Examples of responses include:

Show eagerness to hear about the mentee's experience with trying his or her approach.

Ask the mentee to call and check in at a select time.

Emphasize your belief in the value of the mentee choosing and learning from his or her own solutions and the value to you [the mentor] in hearing how different solutions work out.

6. Summarize that their mentees will probably make some choices that the mentors will disagree with. When the mentor maintains a supportive relationship with the mentee, even though they disagree, the mentor ultimately empowers the mentee. Such actions also make it easier for a mentee to come back and discuss the outcome of his or her plan, regardless of whether it is successful. This will enable the mentee to continue to learn and to develop his or her problem-solving skills.

7. As a final request now or in the closing activity, ask participants to bring their mentoring logs from their workplaces to the next meeting to use in one of the activities in Module 8.

—Teaching Notes—

Module 8
Changing Roles

Goal

- To explore the new roles that mentors play within the organization and how those roles may change expectations, responsibilities, and relationships.

Time

3 hours, 15 min (4 hours with opening and closing activities)

Activities	Methods	Time
8.1 Changing Roles	Individual and small-group work, brainstorming, discussion	60 minutes
Break		15 minutes
8.2 Pass It On	Interactive presentation, pairs work, small-group work, discussion, brainstorming, individual work	120 minutes

Supplies

- Flip chart, markers, and tape
- Paper and pencils
- Post-It note pads
- Instructor's Guide: "Then and Now" (p. 8.11)
- Instructor's Guide: "Match It Up" (p. 8.19)
- Mentors' own mentoring logs from their workplaces, if available

Handouts

- Handout 34: “Then and Now”
- Handout 35: “Power”
- Handout 36: “Pass It On: The Mentee’s Response and the Mentor’s Role”
- Handout 37 (a–d): “Pass It On Scenarios”
- Handout 38: “Guidelines for Passing On Required Information”
- Handout 39: “‘What If’ Scenarios”
- Handout 40: “Match It Up”
- Handout 41: “Sample Completed Peer Mentor Log” (residential and home care versions)

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 session.

Plan an opening activity of about 30 minutes, with a brief warm-up exercise and a discussion of participants’ experiences as peer mentors since the last meeting. The objectives are to share their successes, to identify specific challenges (particularly as related to helping mentees solve problems, as in Module 7), and to highlight other issues mentors have encountered (particularly with regard to their new role and responsibilities) so those concerns may be addressed in this module.

The design and time needed for the closing activity will vary, depending on follow-up plans. Continuing follow-up is recommended, although it may be less formal than a half-day workshop. Follow-up plans should be announced before or during the closing activity. If this is the last planned meeting, some form of celebration may be appropriate at the end of Module 8. If other meetings are anticipated, the closing can be a summary and evaluation of the day’s activities, followed by details about plans for ongoing mentor support.

Activity 8.1

Make enough copies of Handouts 34 and 35, “Then and Now” and “Power,” for each participant.

Prepare three flip chart pages labeled “Personal Changes,” “New Responsibilities,” and “Changes in Relationships” for step 4.

Activity 8.2

Prepare a flip chart page for "Pass It On" as shown in step 2.

Make copies of Handouts 36, "Pass It On: The Mentee's Response and the Mentor's Role," for all participants.

Choose the appropriate version (residential or home care setting) of Handout 37, "Pass It On Scenarios," and make enough copies to distribute one scenario to each member of four groups.

Make copies of Handouts 38, 39, and 40, "Guidelines for Passing On Required Information," "'What If' Scenarios," and "Match It Up," for each participant.

Review agency policies pertaining to the issues raised in the scenarios in Handout 37 and any other issues that require passing it on.

If conducting training in the workplace, ask a representative of the organization who is familiar with the policies (case coordinator, supervisor, or program manager) to participate in the discussion of the case scenarios and, ideally, in the entire activity. Provide the manager with a copy of the instructions for Activity 8.2 before the workshop.

Obtain a copy of any existing peer mentor activity log and confirm that there is a box for "improvement opportunities." If there is no such option, discuss adding this feature to the log sheets with the program manager of the peer mentoring program.

Copy Handout 41, "Sample Completed Peer Mentor Log," for all participants, or create a similar handout from the peer mentor log used by the organization.

—Teaching Notes—

—*Teaching Notes*—

Activity 8.1: Changing Roles

60 minutes

Learning Outcomes

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

Reflect on and describe changes in themselves, their responsibilities, and their relationships since becoming peer mentors;

Define "power" and describe three different types of power, especially as it applies to their work and work environment;

Describe how peer mentors can positively use their power to influence mentees; and

List several strategies for dealing with possible negative reactions to their new role as mentors.

Key Content

- "Power" can be seen as the ability to move people, ideas, objects, or events. Different types of power include *power from within* oneself, *power with* others, and *power over* others.* Power is neither positive nor negative in itself—the ways power is used can feel positive or negative.
- Through their new role in the organization, peer mentors will likely experience changes in their sense of power. In terms of *power from within*, they have new or enhanced abilities and skills. In terms of *power with*, they play a key role in influencing a coworker's development and success.
- Power can also be seen as the possibility of getting something done. Because of their new position in the organization, peer mentors can help the organization identify and address the needs of new employees and advocate for change, thereby helping the organization improve and achieve the goals set for the peer mentoring program. This "positional power" is an extension of *power with*. However, this type of power may be misperceived as *power over* others, which can lead to confusion between the mentor and coworkers if it is not clarified.
- Acknowledging and accepting their increased capacity to "get something done" (i.e., their increased power within the organization) can help mentors to more effectively manage their new responsibilities (toward the mentees and the organization).
- Coworkers and other staff may have new (positive or negative) perceptions of and reactions to direct-care workers in their new role as mentors. Mentors can use their pull-back and active listening skills to manage negative reactions to their new role.

* Starhawk, *Truth or Dare* (HarperCollins, 1989).

Activity Steps

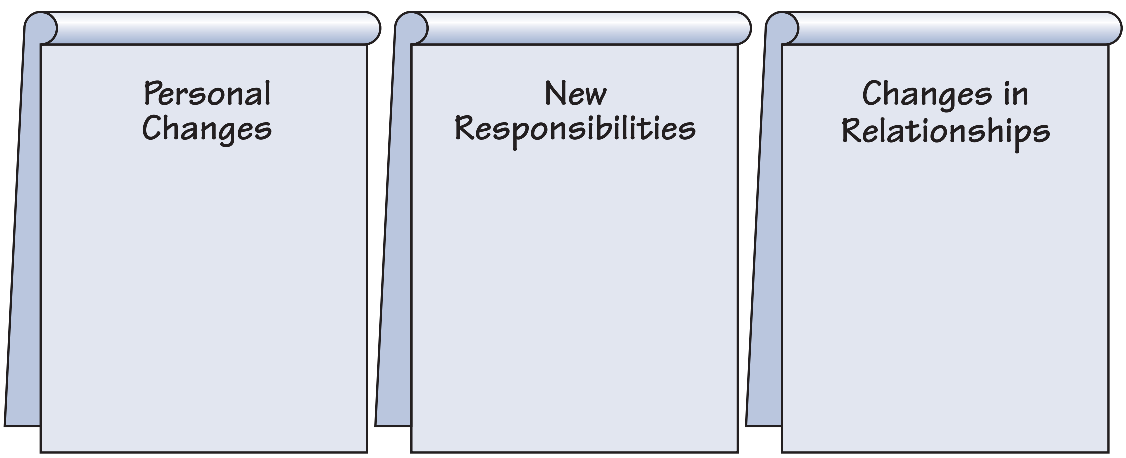
Individual and small-group work (30 minutes)

1. Ask participants to take a moment to think of themselves when they first began the training and to consider themselves now. Ask them what changes they have noticed in themselves, in what they do at work, and in their relationships with others.

2. Distribute Handout 34, "Then and Now." Read each question aloud and give examples from the accompanying Instructor's Guide (p. 8.11). Pause after each question while participants jot down their personal thoughts and reflections about it.

3. Divide the participants into small groups of three or four. Distribute a Post-It note pad to each group, and ask them to choose one person to be the reporter. Ask participants to take 15 minutes to share their thoughts about each question within the group, choosing the level of self-disclosure at which they are comfortable. After discussing each question, the group should summarize its responses, with the reporter writing each point on a separate Post-It note.

4. After 15 minutes, have participants place the Post-It notes on the flip chart pages corresponding to each question. Invite everyone to gather around each chart and silently review the notes from all the groups.

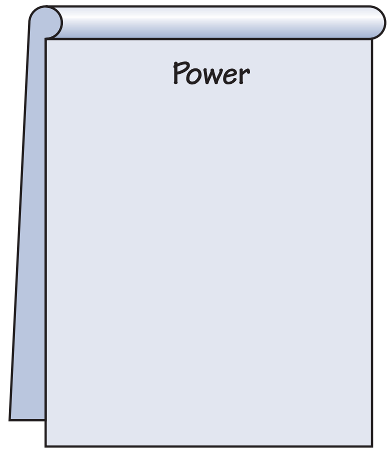


5. For each flip chart page, ask volunteers to identify the common themes that emerge from the various notes.

Brainstorming (10 minutes)

6. After participants return to their seats, acknowledge that many things have changed for them, individually and as a group, as they have taken on their new role as peer mentors. Note that this new role includes leadership, and this leadership may involve exercising a different kind of power within their organization than what they had in the past.

7. Write the word "Power" in the middle of a flip chart page. Distribute paper and ask participants to take 1 minute to write down every word that comes to mind when they think of power.



8. After 1 minute, ask participants to stop writing. Ask one participant to say two words from his or her paper; write the words on the "power" flip chart. Continue around the group (more than once, if necessary) until all the participants' words have been listed. As you write the words on the flip chart, group them according to the three types of power to be discussed (see Key Content and Teaching Tip, below).

Teaching Tip
Visualize one section of the flip chart page for "power from within," one section for "power with," and one section for "power over." Do not label these sections nor explain why you are writing the words in different areas.

Discussion (20 minutes)

9. Ask participants:

What are some things that stand out to you about the words people used to describe "power"?

Which words feel positive and which ones feel negative?

Do you see any similarities among the words grouped together on the flip chart page?

10. Distribute Handout 35, "Power," and note that a simple definition of "power" is "the ability to move people, ideas, objects, or events." Emphasize that power itself is neither positive nor negative; the ways power is used can feel positive or negative.

11. Discuss the three different types of power—power from within, power with, and power over—and ask participants to identify which type of power is reflected in each of the three word groups on the flip chart page. Label the three types accordingly.

12. Ask participants:

What power do peer mentors have?

Since you have been a mentor, has your sense of your own power changed? If so, which types of power?

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Activity 8.1, continued

How can you use this power positively to help peers?

How does it feel to recognize you have power and influence as a result of your changed role?

Teaching Tips

Taking on this new role has likely caused changes in the power dynamics mentors experience because:

- They feel more powerful within themselves due to their new or enhanced skills and abilities.
- Through collaboration with mentees and others, they have power to shape mentees' work experiences and environment.
- They have moved up in the organization and therefore appear to have increased power relative to others within the organization.

People may be shy to own that they have power. This is often a difficult concept for direct-care workers, who often report feeling powerless. An extended discussion around accepting the idea of having power may be warranted.

13. Be sure to note that "more power" is not the same as "power over." If participants report having increased power-over, explore this point carefully, in order to clarify the nature of their position and to set the stage for the discussion in step 15.

14. Note that so far participants have discussed their own changing sense of power. Acknowledge that there may also have been changes in the way other people perceive their new position within the organization. Some people may think the mentors now have power over mentees—i.e., that mentors perform supervisory functions like hiring, firing, or promoting. Other direct-care workers may be concerned that the mentors will act as if they are somehow better than their coworkers and try to exercise power over them. Lastly, supervisors or administrators who have not completely accepted the peer mentoring program may not be supportive of the mentors' new roles and their new leadership capacity.

15. Refer to the "Changes in Relationships" flip chart page from step 4. Ask participants:

Which of these changes in relationships could be due to perceptions of power?

What else could account for the changes?

How have you reacted to or handled these changes?

What other approaches or strategies could you use to deal with such changes in positive ways?

Teaching Tips

If peer mentors haven't experienced changes in relationships in their new roles, discuss how they might handle such situations when they do come up.

This is an opportunity to reinforce that communication skills addressed in this training are not only useful when working with mentees but are also essential for maintaining relationships with coworkers and supervisors. It may be necessary to pull back from emotionally charged interactions, use active listening, paraphrase, and ask open-ended questions to clarify both the meaning and the feelings behind communications from others.

Mentors need to know whom they can go to for coaching support when problems with coworkers, supervisors, or other staff are not resolved with communication skills. Problems with coworkers might be discussed with a supervisor or program manager; problems with supervisors might be discussed with the program manager.

16. Mentors are also in a position to offer insights about how things are working in the peer mentoring program and in general in order to help improve the organization overall. These are examples of power-with. Mentors' options vis-à-vis organizational "improvement opportunities" are discussed in Activity 8.2.

17. Summarize by asking participants what they have learned from this activity, and how it applies to their work. Guide this discussion to include the points in Key Content.

—Teaching Notes—

—Teaching Notes—

Instructor's Guide 8.1: Then and Now

How have you changed, either at work or outside of work, since becoming a peer mentor? For example:

- Do you have new or stronger communication or problem-solving skills?
- Are there things you can do now you couldn't do before?
- Are there situations you can handle now that you couldn't before?
- Has your attitude toward work, consumers, coworkers—or yourself—changed?

Do you have new responsibilities at work? For example:

- What new responsibilities do you have related to peer mentoring?
- Do you have other new duties?

How have your relationships at work changed? For example:

- Do you have new relationships?
- Have any old relationships gotten stronger?
- Have any old relationships become more difficult?

—Teaching Notes—

Activity 8.2: Pass it on—Sharing Information in Peer Mentoring

120 minutes

Learning Outcomes

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

List three kinds of information mentors may discover in the course of mentoring that are important to share with other staff in the organization;

Identify when the mentee is responsible for passing along information and when the mentor is responsible;

Identify which information learned from a mentee may be kept confidential and which information a mentor is required to pass on;

Explain how to pass on required information without breaking the trust established in the mentoring relationship; and

Explain the concept of "improvement opportunities," and describe how complaints, compliments, suggestions, and problems that are identified through peer mentoring can be shared to improve processes, policies, training, and other functions within the organization.

Key Content

- The term "pass it on" means sharing information with appropriate staff concerning three main areas:
  - Health and safety of the consumer;
  - Emotional and physical well-being of the mentee; and
  - Lessons learned or insights that could benefit others in the organization ("improvement opportunities").
- In their caregiving role, mentors are required to follow explicit policies and procedures, mandated by law, regarding the consumer's right to privacy. Failure to comply with these policies and procedures can lead to disciplinary and/or legal action against an employee and an organization. At the same time, direct-care workers are responsible for reporting issues or conditions that could adversely affect the health and safety of the consumer and/or the reputation of the organization.
- In their new role, peer mentors must now also take into consideration a mentee's right to privacy vs. the mentors' responsibility for reporting situations that could endanger the consumer, the mentee, or the organization.
- When a consumer-related issue needs to be reported, it is primarily the mentee's responsibility. The mentor's main role is to encourage and support the mentee to pass on information appropriately.

- However, when a mentee puts him- or herself, the consumer, or the organization at risk and doesn't report it appropriately, the mentor is required to pass on the information. This type of situation can raise issues of confidentiality, particularly if the mentee has asked that information not be shared. Mentors must consider carefully whether the information needs to be shared with organizational staff or the mentoring team and how best to share the information in order to maintain a trusting relationship.
- A mentor may learn about complex personal issues in a mentee's life that create problems at work and at home. *Mentors must be clear that it is not their role to act as counselors.* In these situations, the role of the mentor is to listen fully to the mentee and suggest a person the mentee can speak with about the situation. If the mentee does not seek the necessary support and the mentor feels the situation puts the mentee or those she is caring for at risk, the mentor must then pass on the information.
- As discussed in Module 6, to establish a supportive trusting relationship, the mentor should be clear with the mentee from the beginning about the mentor's role in passing on information to other people in the organization when necessary. To maintain the integrity of the mentor–mentee relationship, it is important for the mentor to tell the mentee of situations in which the mentor cannot honor confidentiality of information and why.
- Mentors are in a position to see how effectively the organization supports new employees and to pass on their own insights or those of mentees to the program manager. This feedback gives the organization an opportunity to continuously improve its support for workers and consumers. In passing on their insights, mentors are using their power to support the goals of the peer mentor program.

Activity Steps

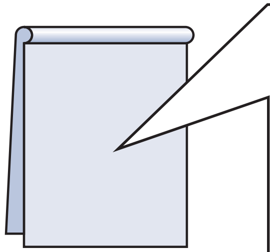
Interactive presentation (10 minutes)

1. Ask participants to raise their hands if they have talked with another person about a situation that occurred while mentoring—for example, talking to another mentor or a supervisor to figure out what to say or do in a particular situation. Reminding participants to respect confidentiality and not to share names or identifying details about individuals, ask:

What kinds of situations came up?

What did you need to share that you felt you couldn't, or shouldn't, handle yourself?

2. Post the prepared flip chart page, "Pass It On," and show how mentors' responses fit into these categories for passing it on:



Pass It On

"Pass it on" means sharing information concerning:

- Health and safety of the consumer
- Emotional and physical well-being of the mentee
- Improvement opportunities for the organization

Maintain confidentiality whenever possible.

3. Note that the same confidentiality requirements that apply, by law, to working with consumers do not apply to the mentor–mentee relationship. However, such requirements do provide useful guidelines for respecting a mentee's right to privacy and confidentiality. Ask participants:

What does it mean to keep a conversation confidential?

How do you currently maintain confidentiality in your work with consumers?

How is confidential information learned from a mentee similar to and different from that of the consumer relationship?

Teaching Tips

A working definition of "confidentiality" within the mentor–mentee relationship could be "respecting and keeping information learned in private conversations to yourself."

In the relationship between a consumer and a direct-care worker, laws mandate respect for privacy and confidentiality for both personal and medical information. However, no formal confidentiality guidelines exist to cover a mentor–mentee relationship. This relationship is more like that between trusted friends, with some of the trust based on an assumption of confidentiality.

4. Note that maintaining confidentiality is important in establishing trust within the mentor–mentee relationship, but sometimes information given by or about a mentee must be passed on. One responsibility of the peer mentor is to pass on information that is critical to the health and safety of consumers and workers or that may impact overall organizational outcomes. Knowing what to report and what not to report can be confusing. This activity will help participants to sort out the differences.

Pairs work (20 minutes)

5. Note that participants will focus first on sharing information related to consumers. Have participants pair up with the person sitting next to them, and distribute a blank sheet of paper to each pair.

6. Explain that the objective of this activity is to list situations or information about a consumer that they, as direct-care workers, must report to a nurse or supervisor. They will have 3 minutes to generate this list together.

Teaching Tip

Participants should be very familiar with this material from their direct-care worker training and experience with "Observe, Record, and Report." If participants are unclear about what is being sought, provide examples such as bed sores, bruises, falls, change in mood.

7. After 3 minutes, ask the teams to count the number of situations they listed. Survey the groups to find out how many each team came up with. Ask the team (or teams, in case of a tie) with the highest number to read their list aloud. Ask other groups to report additional situations that they identified.

8. Thank all the teams for their efforts. Note that, as direct-care workers, they are all very experienced and knowledgeable in this area. But now, they are taking on the new role of peer mentor. Ask participants to imagine they become aware of a reportable situation, like the ones they have just listed, happening with a *mentee's consumer*. Discuss the following questions:

Who is responsible for passing on this information?

Why might a mentee be reluctant to report such situations?

What is the mentor's role if a mentee is reluctant to report?

Teaching Tip
Be prepared to emphasize that there are many ways a mentee might respond to these situations when they come up, and the mentor's role is different for each response. Refer to Handout 36, "Pass It On: The Mentee's Response and the Mentor's Role," as a guideline for facilitating this discussion.

9. Distribute Handout 36, "Pass It On: The Mentee's Response and the Mentor's Role," as a summary of this discussion.

Small-group work and discussion (30 minutes)

10. Explain that, as peer mentors, participants may also learn information *about a mentee* that must be shared with another staff member at the organization—a supervisor, nurse, or program manager—in order to protect the health and safety of the consumer, the mentee, another staff member, or the interests of the organization. Note that passing on information about a mentee is one of the most challenging parts of being a mentor because it raises issues of confidentiality and trust. Explain that the next activity will help participants better recognize situations in which information about the mentee may need to be passed on, and assess how to pass on that information while still honoring the mentor–mentee relationship.

11. Divide the participants into four groups; distribute the copies of Handout 37 (choose residential or home care scenarios), giving one scenario to each group. Ask participants to read through and discuss the scenario together for 10 minutes, answering the questions on the sheet (one member should be designated as the group's reporter).

12. Bring the groups back together and ask the reporter from each group to read the scenario aloud and report their answers. After each report, ask the rest of the group:

What was your initial reaction when you heard this scenario?

Is there anything about this scenario that might make you need to pull back?

What are some other ways the peer mentor might handle the situation?

Teaching Tip
The primary purpose of this activity is to provoke thinking and discussion about complex situations. Be mindful of the time during these discussions and decide how deeply to delve into each issue raised by the groups.

Interactive presentation (25 minutes)

13. Explain that other issues may arise within the mentor–mentee relationship including disclosures of child abuse, rape, eating disorders, mental health, and legal issues. Often these are complex matters, requiring lengthy and difficult discussions with people trained to deal with such issues. If these issues put consumers, mentees, or other workers at risk, the mentor may need to pass on the information. Review the sixth bullet in Key Content to emphasize the point that *mentors must be clear that it is not their role to act as counselors*.

14. To further clarify the mentor's role, distribute Handout 38, "Guidelines for Passing On Required Information." Review the handout, and highlight strategies not raised in the earlier discussions.

15. Distribute and discuss Handout 39, "'What If' Scenarios." If time allows, role-play some of the scenarios.

Teaching Tip
These scenarios are meant to provide participants with the opportunity to explore their own comfort level and reactions. There are no right or wrong answers in such situations; use them to prepare mentors for future encounters that may require them to pass it on.

Brainstorming (10 minutes)

16. Moving on to the third area of information mentors should pass on to others, ask participants:

Have you discovered that certain organizational policies or procedures have not been clearly communicated to mentees? What are some examples?

Have you noticed things mentees should have learned in training and did not? What are some examples?

Have you or your mentees ever come up with a new way to address a consumer or organizational issue that others might find useful?

17. Explain that these are examples of "improvement opportunities"—information, ideas, or insights that could help the organization achieve its goals for high-quality care and jobs. Emphasize that mentors are in a unique position to identify areas for improvement and change within their organization. They often learn firsthand what a new employee encounters on the job, *and* they possess the power and position within the organization to offer suggestions for changes.

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

18. Explain that this exercise will help participants identify improvement opportunities from their conversations with mentees. Distribute Handout 40, "Match It Up," read the instructions, and give participants 2 minutes to complete the task.

19. After 2 minutes, review the definitions, asking people to share their answers. After you have covered all the definitions, ask:

What definitions on the page are also "opportunities"?

20. Indicate that each of the four words provides an opportunity for improvement in the organization. Use the following questions to guide a discussion on the mentor's role in acting on improvement opportunities:

Why might a complaint by a new employee not be taken seriously or seen as an opportunity by members of your organization? If new employees complain, how are they perceived or labeled?

If a new employee compliments a colleague on what she or he did, how might the employee be seen or labeled by people in the organization?

What generally happens to suggestions shared by new employees at staff meetings or in-services? What happens to the employee?

When a new employee names a problem, how is that person then seen by the organization? Why might it be difficult for the organization to see the problem as an opportunity to improve its practices? Who is blamed for the problem?

Why might a complaint, compliment, suggestion, or problem coming from you be more likely to be heard and acted on than one coming from a new employee?

Teaching Tips

It is particularly important to draw on the mentors' experiences and knowledge. Continuously ask if mentors have examples of what is being discussed to illustrate the discussion.

See the Instructor's Guide, "Match It Up," (p. 8.19) for background on how these terms relate to improvement opportunities.

21. Have participants take out their mentoring logs, or distribute Handout 41, "Sample Completed Peer Mentor Log." Ask participants to work in pairs to find improvement opportunities in the notes, reminding them that they may initially be disguised as complaints, compliments, suggestions, or problems.

22. Ask each pair to report one improvement opportunity and how they would pass it on. Remind participants that guidelines for confidentiality may apply to sharing information about improvement opportunities (especially when a mentee has a concern about how his or her feedback might be received). Mentors can address this concern by involving the mentee in passing on the information—identifying what he or she is comfortable passing on, and sharing the credit for new ideas and insights that are generated.

Summary (5 minutes)

23. Review the three areas of information that must be shared with other staff, and ask participants what they learned in this activity about each area. Emphasize the importance of respecting confidentiality, all the while recognizing what information is required to be shared for health and safety reasons and what information would be valuable to the organization if it were conveyed.

Instructor's Guide 8.2: "Match It Up"

Points to address in the discussion:

Complaint: an expression of displeasure, such as poor service at a store.

In most organizations, a complaint is seen as negative. Often, a complaining employee is labeled a chronic complainer, a sour puss, a pessimist, or just wrong. A complaint in its simplest form is an expressed idea—often, a negatively charged statement—that something is not going well, is uncomfortable, or no longer works. To change a complaint into an improvement opportunity, a supervisor or administrator must hear the complaint and see it as an opportunity to fix a problem. An example would be that when restaurant managers hear, "The food is cold," their improvement opportunity is to work to ensure the food arrives hot to diners.

Compliment: an expression of respect or esteem.

A compliment is an outward expression that something is going well or someone is doing something right. It becomes an improvement opportunity when it is recognized that what is working well in one instance may improve another situation.

Here is an example of a compliment becoming an opportunity for improvement. A consumer writes a letter to an organization to compliment her direct-care worker on giving the best bed bath ever. Knowing how difficult it has been to please this particular consumer, the clinical director asks the direct-care worker, "What's your approach?" Once the direct-care worker reveals her approach, the organization asks her to assist with teaching the bed-bath technique to new aides and other direct-care workers working with this consumer.

Suggestion: an idea to make things better.

Suggestions emerge when talking and thinking about better ways of getting things done or how to work best with someone. Ideas become opportunities when they are encouraged and listened to. An organization that has a suggestion box, and actually reads and pays attention to what employees submit, is recognizing improvement opportunities. An example is that a direct-care worker notices that none of the consumers likes eating whole wheat bread, thinks of a solution —e.g., switching to potato bread—and then suggests this to the dietician or other staff who have ability to implement the change.

Problem: an issue or situation that needs to be resolved.

Problems are particularly difficult to see as organizational improvement opportunities because people often see a problem as connected to a particular person and not the organization as a whole. However, when a pattern emerges about a specific problem—i.e., the problem is occurring in more than one area, or with more than one person—a mentor may be able to determine if the problem is arising because the organization isn't doing something as effectively as possible. For example, a mentor who discovers that new employees are not accurately filling out timesheets may deduce that the forms are not being explained well enough during orientation. In this case, an opportunity exists to improve how timesheets are introduced to new employees.

—Teaching Notes—