

Reflective practice for the mātau ā-wheako consumer, peer support and lived experience workforce

A guide for kaiwhakahaere/managers

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This guide has been shaped by the expertise of mātau ā-wheako consumer, peer support and lived experience (CPSLE) leaders and cultural leadership, to be relevant for the unique supervision needs of the mātau ā-wheako CPSLE workforce and guided by the principles of Te Tiriti o Waitangi.

This guide draws on previously published supervision guides.<sup>12</sup> It is also informed by an <u>evidence review</u> and we thank Taylya Postelnik and Angela Jury from Te Pou for their contribution to this.

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This document has been written by Te Pou. The authors include Holly Coulter, Caro Swanson and Kerri Butler (independent contractor).

## Part one – A general guide to reflective practice for the mātau ā-wheako CPSLE workforce

#### Terms used in this guide

- Mātau ā-wheako CPSLE worker refers to lived experience in all its diverse forms.<sup>3</sup> This guide uses mātau ā-wheako CPSLE worker to describe all those working in a role that requires personal lived experience of mental health challenges or problematic substance use. This term is used in lieu of supervisee in this guide to acknowledge the reciprocal, rather than hierarchical, nature of the relationship for reflective practice for mātau ā-wheako CPSLE workers.
- Reflective practice in this guide refers to a regular, ongoing process wherein two or more people meet for facilitated, in-depth reflection on professional practice. This term is used in lieu of supervision in this guide to support the incorporation of peer values such as mutuality and experiential knowledge. Other sectors may use reflective practice to mean different things.
- Reflective practitioner is an experienced individual with in-depth knowledge and experience of facilitating the reflective practice process to support the mātau ā-wheako CPSLE worker. Ideally this person will be an experienced mātau ā-wheako CPSLE worker or have a solid understanding of the nature of mātau ā-wheako CPSLE roles. This term is used in lieu of supervisor in this guide.
- > **Tāngata whai ora** is a literal translation of tāngata whai ora is "people seeking wellness"<sup>4</sup>, and in this context we mean people who are in the process of, or on a journey towards, improving their wellbeing. This term is used in this guide to describe people and their whānau who access mental health and addiction services.

#### Overview of this guide

This guide has been developed to support the mātau ā-wheako CPSLE workforce to engage in reflective practice. It provides an overview of reflective practice for the mātau ā-wheako CPSLE workforce, including different approaches, key elements of effective reflective practice, and benefits to mātau ā-wheako CPSLE workers. It also highlights culturally safe and responsive practice.

This guide is not designed to provide an in-depth guide to all aspects of reflective practice, but to specifically cover the unique context of the mātau ā-wheako CPSLE workforce, and how aspects of traditional supervision may be used in effective reflective practice for the workforce. This guide seeks to embed Te Tiriti to ensure culturally safe reflective practice with Māori and to acknowledge the importance of a 'by Māori for Māori' approach to reflective practice.

Reflective practitioners should have sufficient experience and training to undertake this process. There are a few published in-depth supervision guides<sup>5, 6</sup> for the clinical mental health and addiction workforce, as well as a range of supervision training providers, including bicultural and kaupapa Māori supervision. However there is a lack of training focused specifically on supervision or reflective practice for the mātau ā-wheako CPSLE workforce. This guide is intended to complement existing training about supervision by providing information relevant to the unique needs of this workforce.

This guide is part of a suite of reflective practice guides for the mātau ā-wheako CPSLE workforce. This includes a guide for <u>mātau ā-wheako CPSLE workers</u>, a guide for <u>reflective practitioners</u>, and this guide for kaiwhakahaere/managers. Each guide includes the same information in part one, followed by information specific to the audience in part two.

#### Reflective practice

Supervision is a common tool used in mental health and addiction professional practice. Its purpose is to ensure ethical, quality service provision. Supervision enables the mental health and addiction workforce to effectively translate new knowledge into practice and provides an opportunity to explore challenges and enhance their practice.

For some members of the mātau ā-wheako CPSLE workforce, supervision may not be a preferred term, having historically been used in the context of clinical supervision, and with an implied hierarchical rather than reciprocal relationship.

In this guide, we suggest a reframing of both the concept and the name of supervision for the mātau ā-wheako CPSLE context, thus the term 'reflective practice' is used throughout this guide. This term can be used to encompass the supervision process while incorporating peer values such as mutuality, the authentic two-way relationship between people through 'the kinship of common experience', and experiential knowledge, valuing and sharing the expertise and wisdom developed from personal experiences. This guide explores some of the specific considerations as they relate to mātau ā-wheako CPSLE workers.

#### Te Tiriti o Waitangi

Mātau ā-wheako consumer, peer support and lived experience (CPSLE) work sits within the context of Te Tiriti o Waitangi (Te Tiriti) principles, as outlined in *Wai 2575:* The Health Services and Outcomes Inquiry and subsequently in Whakamaua: Māori Health Action Plan 2020-2025, as well as Kia Manawanui Aotearoa. Te Tiriti reflects our commitment to tāngata whenua.

The table below outlines how the Tiriti-centric principles should be actioned for workers.

| Tiriti-centric principles | Actions  |
|---------------------------|--|
| Tino rangatiratanga       | Supporting Māori mana motuhake (autonomy) and leadership in the design, delivery, and monitoring of services.                                |
| Self-determination        | Supporting the self-determination of people accessing services, and their whānau, at all stages of service design, delivery, and evaluation. |
| Mana taurite              | Committing to achieving equitable health outcomes for Māori in mātau ā-wheako (CPSLE) practice.  |
| Equity                    | Committing to attaining equitable health outcomes for people accessing services and their whānau.  |
| Whakamarumarutia          | Ensuring that support from mātau ā-wheako practice is well informed and culturally safe.   |
| Active protection         | Ensuring that mātau ā-wheako practice proactively embodies the preferences of people accessing services and their whānau.                    |
| Kōwhiringa                | Advocating for greater access to culturally appropriate ways that recognise and support the expression of hauora Māori frameworks.           |
| Options                   | Advocating for the diversification of support options and greater access to those options.   |
| Pātuitanga                | Working in a relational rather than transactional manner with Māori.   |
| Partnership               | Working in a relational rather than transactional manner with people accessing services and their whānau.                                    |

Mātau ā wheako CPSLE workers are required to continually develop and demonstrate culturally safe and responsive practices when working with Māori and to give effect to the principles of Te Tiriti<sup>10</sup>. Culturally safe practices include honouring and using te reo Māori, understanding and incorporating tikanga such as karakia, acknowledging mana whenua (the home people/peoples of the area), and understanding the importance of whakawhanaungatanga (developing authentic relationships).

Practice development is an ongoing process, and effective reflective practice supports workers to consider and reflect on progress in terms of awareness, knowledge, skills, and responsiveness. All those involved in undertaking reflective practice need to honour Te Tiriti o Waitangi within their practice and to support others to do so.

#### Peer values

All mātau ā-wheako CPSLE roles are defined and underpinned by values intrinsic to lived experience communities spanning mental health and addiction. There are six key values as shown below.

#### Mutuality

Authenticity in relationships based on common experiences

## **Experiential** knowledge

Valuing and sharing the expertise and wisdom developed from our personal experiences

#### **Participation**

Valuing people's right to participate in and lead service delivery and design, including their own treatment

#### Self-determination

Valuing and supporting people's right to make their own life choices, free from coercion

#### **Equity**

The right to be treated fairly and be free from discrimination

## Hope and wellbeing

The belief there is always hope and that resilience and wellbeing are possible for everyone

These values demonstrate the core beliefs within mātau ā-wheako CPSLE workforce and provide a platform for reflective practice sessions.

## Understanding reflective practice for the mātau ā-wheako CPSLE workforce

Reflective practice is a process wherein two or more people meet for facilitated, in-depth reflection on professional practice. Generally, one person will act as the reflective practitioner, supporting one or more people to reflect. This is a regular and ongoing process designed to provide an opportunity to explore and reflect. Reflective practice is a two-way relationship. Both the reflective practitioner and the mātau ā-wheako CPSLE worker need to be actively involved and committed to reflective practice for it to be effective.

#### Reflective practice can support:

- > practices that provide high quality, safe and effective support for tangata whai ora and their whanau
- > accountable and ethical decision making in all aspects of practice
- > facilitation of learning and professional development
- worker wellbeing, managing trauma responses, and personal growth<sup>11</sup>
- > culturally safe and responsive practices when working with Māori
- > implementing Te Tiriti o Waitangi principles in practice.

While reflective practice is a tool to support a worker's wellbeing, it is not intended to provide a therapeutic or counselling function. This therapeutic support should be sought and provided separately, so that reflective practice sessions can focus on professional practice and personal growth.

A trauma-responsive approach<sup>12</sup> to reflective practice is important for the mātau ā-wheako CPSLE workforce. This is when practitioners use a trauma-informed lens to structure reflective practice. Vicarious trauma (sometimes called compassion fatigue) describes the impact on workers of working with people who have experienced their own trauma.<sup>13</sup> A safe, trauma-responsive space can help to mitigate the impact of trauma and vicarious trauma for workers.<sup>14</sup>

Reflective practice is one component of the infrastructure that enables manaakitanga, quality improvement, sustainability, and oversight of the mātau ā-wheako CPSLE workforce. Elements of activities, like coaching and mentoring, may be drawn upon but are distinct from and complement reflective practice.

The difference between reflective practice and coaching and mentoring can be understood as follows.

- Reflective practice is the process of working together to develop professional practice to ensure culturally safe, ethical, quality service provision to tangata whai ora and whanau who access health services.
- Mentoring is a long-term relationship facilitating transfer of knowledge and skills between an experienced and less experienced worker. Mentoring aligns with the key peer values of mutuality and reciprocity. Mentoring from a current worker can be useful for staff new to an organisation and can help to smooth their transition into the workplace.<sup>15</sup>
- > **Coaching** is a short-term, goal focused relationship, often based on a performance related goal.

#### Benefits of reflective practice

Reflective practice benefits mātau ā-wheako CPSLE workers, people accessing services and whānau, and organisations. A responsive, informed, and well supported workforce provides better services and enhanced wellbeing for people accessing services. <sup>16, 17</sup> For organisations, it improves worker performance and retention, supports safe practices, and helps to achieve organisational goals and objectives. <sup>18, 19</sup> Reflective practice is a tool which can be explored using holistic frameworks and models including Māori health models, such as Te Whare Tapa Wha.

The mātau ā-wheako CPSLE workforce has specific needs which reflective practice can meet. Reflective practice can:

- > support and educate to ensure safe, ethical, and effective work practices
- > identify and address areas for competency development
- > minimise 'peer drift' where mātau ā-wheako CPSLE workers can be pulled towards adopting a clinical approach which may conflict with peer values
- > support mātau ā-wheako CPSLE workers to understand the best ways to use their own lived experience for the benefit of others
- > support resilience and responses to stressful situations
- > prevent burnout and vicarious trauma
- support cultural accountability and development, reflections on own biases, and effectively working with people from cultural backgrounds that are different from their own
- support culturally safe practices when working with Māori and application of Te Tiriti o Waitangi principles.
- > support effectively managing boundaries, confidentiality, dual relationships, and multi-layered relationships
- > set the culture for how mātau ā-wheako CPSLE roles are seen and accepted within organisations and support integration into organisations
- > identify areas for growth and career development
- > support exploration of and critical evaluation of new practices, developments, ideas, and perspectives related to mātau ā-wheako CPSLE workers<sup>20, 21, 22</sup>
- enhance professional development through reflective practice, critical reflection, and solution-seeking skills.

Mātau ā-wheako CPSLE workers may experience unique challenges due to the nature of their roles than non-lived experience workers, such as differing boundaries, values and work practices. Reflective sessions, in particular with a reflective practitioner who has an in-depth understanding of mātau ā-wheako CPSLE values, competencies and the nature of the work, can support workers to navigate some of these challenges. The relationship between a mātau ā-wheako CPSLE worker and a reflective practitioner is founded on the peer values.

#### Tuakana-tēina relationship in reflective practice

The tuakana-tēina relationship (a Māori way of being that encourages learning and reflection), may be a useful approach in the context of the reflective practice relationship for a mātau ā-wheako CPSLE worker. Tuakana-tēina relates to principles of whanaungatanga and ako (to teach and to learn), whakaaroaro (deep and thoughtful consideration), and mana.<sup>23</sup>

Within the tuakana-tēina relationship there is an acknowledgement of reciprocity where the tuakana-tēina roles may be interchangeable where the tuakana also learns from the teina. One way of describing a tuakana-tēina relationship is that an older or more experienced relative (traditionally an older or the eldest sibling or cousin) helps, nurtures, and guides a younger or less experienced relative (traditionally a younger sibling or cousin). Reflective practice for Māori builds on concepts of identity, values, and whakawhanaungatanga. For Māori, identity is central to wellbeing and ideas of self are entwined in the group or the collective rather than the individual. What is important is who someone is, not what someone is.

The relationship between a mātau ā-wheako CPSLE worker and a reflective practitioner is important. Mātau ā-wheako CPSLE work is both value-led and underpinned by values. The concept of a tuakana-tēīna relationship is one that may be relevant for mātau ā-wheako CPSLE workers, recognising the dynamic nature of relationships between two people in a reflective practice setting.

#### Different approaches to reflective practice

There are several different approaches to, and formats of, reflective processes. What works best for a mātau ā-wheako CPSLE worker will vary depending on organisational staffing, resources, needs and culture. Ideally, individual preferences will determine the approach used.

Generally, reflective practice should not be facilitated by a worker's manager, to avoid conflicts of interest and allow an open reflective process.<sup>24</sup>

Reflective practice may be internal (undertaken by someone from within the same organisation) or external (undertaken by someone outside of the organisation). Internal reflective practice may be beneficial in that the reflective practitioner has an in-depth understanding of the specific work the worker undertakes and the organisational context. However, as with reflective practice with a manager, workers may be less comfortable discussing mistakes or concerns with an internal reflective practitioner. Reflective practice contracts that clearly identify roles and responsibilities help build a trust relationship with each other.

Reflective practice may be facilitated by a reflective practitioner either within the same profession or a different profession (inter-professional). Inter-professional reflective practice can provide exposure to diverse perspectives, wider knowledge, and provide more choice of reflective practitioner. Disadvantages may include misunderstandings and an absence of shared theories and language.<sup>25</sup>

For the mātau ā-wheako CPSLE workforce, it is ideal for a reflective practitioner to be an experienced mātau ā-wheako CPSLE worker,<sup>26, 27, 28</sup> who is familiar with the unique characteristics of mātau ā-wheako CPSLE roles.

Reflective practice may take place either one-on-one, or in a group. One-on-one reflective practice allows for focus on the worker's individual needs, while group reflective practice requires less resources and allows for common challenges to be explored in a group setting. It is important to consider how group dynamics may impact this approach, including the possibility that individuals may not want to disclose particular issues or topics in front of internal colleagues.

Reflective practice may be conducted with a reflective practitioner with extensive experience in the same or a related area of practice. It is important to consider whether this may create a hierarchical power dynamic. Alternatively, reflective practice may take place between two mātau ā-wheako CPSLE workers with similar levels of experience as a method of problem solving, discussing ethical dilemmas, reflection, and decision making. It allows the participants to share skills and experiences and learn from one another. This option aligns to the values of mutuality, and experiential knowledge, and may be preferred by the mātau ā-wheako CPSLE workforce.

Reflective practice may take place in-person or remotely (such as via telephone or Zoom). The decision on which of these to choose may depend on the mātau ā-wheako CPSLE worker's own preference, and availability of reflective practitioners who are located geographically close.

#### Characteristics of effective reflective practice

Some key characteristics of effective mātau ā-wheako CPSLE reflective practice are listed below.<sup>29</sup>

- 1. It is based on mutual trust and respect.
- 2. Workers are offered a choice of reflective practitioner regarding personal match, cultural needs, and expertise as much as is practical.
- 3. All those involved in reflective practice have a shared understanding of the purpose of the sessions, which are based on an agreed contract.
- 4. Reflective practice focuses on the sharing/enhancing of knowledge and skills to support professional development and improved service delivery.
- 5. Reflective practice is regular and based on the needs of the worker. Additional reflective practice time should be provided if required.
- 6. Approaches are based on the needs of the worker and availability of practitioners. This may include individual, group, internal or external, remote or a mix of these.
- 7. Employers must create protected time and private space to facilitate the reflective sessions for workers.
- 8. Training and feedback are provided for reflective practitioners.
- 9. Reflective sessions are delivered using a flexible timetable to ensure all workers have access to the sessions, regardless of working patterns.

#### Culture and reflective practice

Culture is a broad and dynamic concept that may refer to many things including ethnicity, gender, age, religion, sexual identity, ability, location or 'place'. Cultural competency is one of the mātau ā-wheako CPSLE competencies. Reflective practitioners and mātau ā-wheako CPSLE workers should ensure they reflect on their cultural competence as part of reflective practice, including specifically how they honour Te Tiriti o Waitangi in their work. For mātau ā-wheako CPSLE workers who are Māori, it may be preferable for reflective practice to be facilitated by a Māori reflective practitioner.

Cultural supervision aims to enhance awareness, knowledge and skills for working with and within the cultural context of tangata whai ora. Cultural supervision enables safe and accountable professional practice, cultural development, and self-care based in the philosophy, principles and practices derived from a culture.<sup>30, 31, 32</sup> It involves the application of cultural values, knowledge and skills and is focused on cultural accountability and cultural development. Cultural supervision may be provided as part of, or in addition to, other reflective practices.

Organisations should look at building capacity for cultural supervision and for reflective practice that includes 'by Māori for Māori'. This could include proactively seeking out and fostering relationships with individuals and organisations that can provide this and who understand the nature of mātau ā-wheako CPSLE work, or by providing training to build internal capacity.

Māori models of health and practice, Māori approaches to supervision, and providers of bicultural supervision training or cultural supervision training may support with building and enhancing organisational capability and capacity.

# Part two - A guide to reflective practice for kaiwhakahaere/ managers

This section outlines information relevant to kaiwhakahaere/managers who are responsible for establishing and enabling reflective practice for mātau ā-wheako CPSLE workers within their organisation.

Kaiwhakahaere/managers play an important role in ensuring effective reflective practice is in place to support safe, effective, and accountable practice in organisations. This guide is not intended to provide in-depth instructions for establishing supervision within an organisation, as existing supervision guides cover this in detail. Instead, this guide aims to cover some key considerations specific to establishing and enabling reflective practice for mātau ā-wheako CPSLE workers.

#### **Establishing and enabling reflective practice**

It may be helpful to review what processes and policies are currently in place within the organisation. If clinical or other support staff are employed, there may be an existing supervision policy. It is important to acknowledge that what works for clinical staff in supervision may not work for mātau ā-wheako mātau ā-wheako CPSLE staff. Existing supervision policies may need to be amended, particularly to reflect and include the mātau ā-wheako CPSLE values and reflective practice. A review should include discussion with workers about their preferences and needs around reflective practice. It should also look at current requirements around who provides reflective practice and supervision to the organisation, and how this is monitored, funded and evaluated. Congruence with the <u>mātau ā-wheako CPSLE</u> values should be considered.

Establishing a clear rationale, purpose, goals and objectives for reflective sessions is important to get both team members and organisational leaders and managers on board with understanding the importance of reflective practice. While reflective practice is not currently mandated for mātau ā-wheako CPSLE workers, it has a range of benefits and as outlined earlier in this guide.

It is important that reflective sessions happen regularly, and time is set aside and protected for this. Workloads may need to be adjusted accordingly.

#### **Funding reflective practice**

The cost of reflective practice may be a constraint on the options that can be offered. If your organisation is not able to support external reflective practice because of the cost, you may be able to consider other ways of providing it. One option is to develop memoranda of understanding (MOU) with reflective practitioners from compatible external organisations or teams within your organisation to provide reflective practice for each other's mātau ā-wheako CPSLE workers. This arrangement can work well to provide choice and reduce costs. It is important to monitor the arrangement to ensure its ongoing effectiveness. Another option to reduce costs may be providing group reflective practice sessions rather than individual sessions.

#### **Documentation**

There is generally an expectation that reflective practitioners will provide a contract, and that a record will be kept in some way of the sessions, whether via an attendance record, a record of the session itself, or both. Organisations may have different requirements for what needs to be recorded, and some templates can be found here as part of the <u>Supervision guide for mental health</u> and addiction kaiwhakahaere/managers.

#### Confidentiality

Part of an effective reflective practice relationship is clarity around what, if anything, that is discussed during sessions may be shared with managers. Generally, the content of sessions remains confidential. If there are safety or practice issues, the reflective practitioner is ethically obliged to address these and may need to break confidentiality. It is important to ensure all parties are clear on this, the processes around this which should be agreed and documented within contracts before reflective sessions are started.

## Choosing reflective practitioners and approach to reflective sessions

Finding suitable reflective practitioners may present a challenge. For the mātau ā-wheako CPSLE workforce, which is a small workforce, capacity or a lack of available training may mean a limited choice of reflective practitioners. Choosing reflective practitioners should always be done in partnership with the mātau ā-wheako CPSLE worker.

Some factors to consider when identifying reflective practitioners include:

- An understanding of the role, values, competencies, and common challenges faced
- > experience in the relevant sector, eg mental health and problematic substance use are very distinct areas
- > current knowledge, skills and a willingness to keep up-to-date
- > supervision training, qualifications or expertise
- > willingness to work in accordance with requirements of your organisation
- > ability to practice cultural safety, in particular with regard to Māori
- > not performing in a line management role (if a reflective practitioner is also the worker's manager, independent support should be available)
- > being willing to undergo evaluation of their reflective practice.

Managers can build internal capacity by offering supervision training to existing experienced mātau ā-wheako CPSLE workers. As the workforce grows, there will be increased demand for mātau ā-wheako CPSLE reflective practitioners. Growing capacity is therefore valuable.

There are a few approaches which may be taken within reflective practice. This can include individual, group, and peer reflective practice, as outlined earlier in the guide. Decisions on what form of reflective practice is used will depend on organisational staffing, resources, needs and culture. It is important that reflective practitioners and mātau ā-wheako CPSLE workers are involved in these decisions. Individual needs and preferences should be considered.

#### Reviewing and evaluating reflective practice

Ongoing organisational evaluation and review of reflective sessions is important. This may be done informally through regular discussions with staff about how reflective sessions are going for them. More formal approaches include staff surveys or conducting evaluations which may include surveys and interviews, and policy reviews.

Depending on the outcome of evaluations, there may need to be changes to the reflective practice process and the organisation's policy. Regular review and evaluation of the process is essential in making sure everyone is getting the best out of reflective practice.

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