


RCO Bootcamp Day 1

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NRI
National
Recovery
Institute

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1

Working With Communities



Opioid
Response
Network

- ✧ The SAMHSA-funded *Opioid Response Network (ORN)* assists states, tribes, organizations and individuals by providing the resources and technical assistance they need locally to address the opioid crisis and stimulant use.
- ✧ Technical assistance is available to support the evidence-based prevention, treatment and recovery of opioid use disorders and stimulant use disorders.

2



Working With Communities

3



- ✧ The *Opioid Response Network (ORN)* provides local, experienced consultants in prevention, treatment and recovery to communities and organizations to help address this opioid crisis and stimulant use.
- ✧ *ORN* accepts requests for education and training.
- ✧ Each state/territory has a designated team, led by a regional Technology Transfer Specialist (TTS), who is an expert in implementing evidence-based practices.

3

3



Contact the Opioid Response Network

4



- ✧ To ask questions or submit a technical assistance request:
 - Visit www.OpioidResponseNetwork.org
 - Email orn@aaap.org

4

4



Substance Abuse and Mental Health Services Administration (SAMHSA)

5



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5

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Approach: To build on existing efforts, enhance, refine and fill in gaps when needed while avoiding duplication and not "recreating the wheel."

6



Overall Mission

7



Opioid
Response
Network

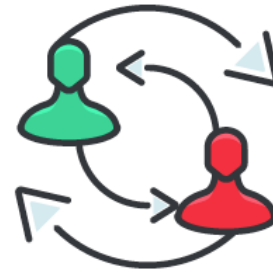
To provide training and technical assistance via local experts to enhance prevention, treatment (especially medications like buprenorphine, naltrexone and methadone) and recovery efforts across the country addressing state and local - specific needs.

7

7

Housekeeping Information

- **Facility information**
- **Breaks**
- **Evaluation**
- **Certificate of Completion**



Interactive = Enjoyable experience

8



Jay Hughes

9

- Speaker, educator, and facilitator
- Accomplished and goal-oriented professional with more than 18 years' experience in both federal and state systems providing services and resources to individuals and families.
- Special expertise in operational techniques, staff development, recovery, and serving the needs of the re-entry community.



9



Catherine Lovvorn

10

- Catherine Lovvorn is a woman in long-term recovery.
- She is a Certified Peer Specialist of addictive disease and mental health, a Forensic Peer Mentor, and a successful re-entered citizen.
- Catherine is a wife and mother who is strong in her faith.
- She spent 5 years working and leading a Recovery Community Organization.





10

Safety Agreements

SAFETY AGREEMENTS

- **Open-mindedness**
- **Respect**
- **Encouragement**
- **“Ouch”**
- **“Stretch”**
- **Confidentiality**

- **What else?**





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11

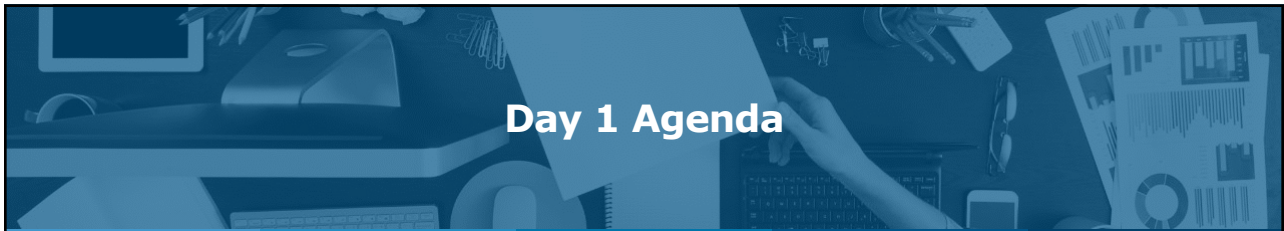
Brief Introductions

- **Name**
- **Location**
- **Relationship to recovery (optional)**
 - Self
 - Family
 - Friend / Ally
- **Motivation for attending this training**




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12



Day 1 Agenda

- Recognize RCO innovations that advance the recovery movement.
- Identify how to get your RCO up and running.
- Develop good governance in selecting your board of directors.
- Define the roles and responsibilities of your board.
- Identify ethical issues for RCOs.



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13



RCO Innovations

Advancing the Recovery Movement

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Advancing the Recovery Movement: Overview

- Recovery Advocacy Movement History
- New Recovery Advocacy Movement
- History of Recovery Community Organizations
- Innovations in Peer Recovery Support Services



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THE ABC's of this Presentation



- ARCO: Associations of Recovery Community Organizations
- CAPRSS: Council on Accreditation of Peer Recovery Support Services
- RCO: Recovery Community Organizations
- RCC: Recovery Community Centers
- PRSS: Peer Recovery Support Services
- D.E.I.: Diversity, Equity, and Inclusion
- SAMHSA: Substance Abuse and Mental Health Services Administration
- RDP: Recovery Data Platform
- BCOR: Building Communities of Recovery



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What's Working Well?

- The national network of Recovery Community Organizations is growing!
- Data collected from over 60,000 peer support records shows that peer support works!
- We have documented the need for even more peer support specialists in our behavioral healthcare systems.
- Accreditation of peer support providers is on the rise and another step toward sustainability.



17

Faces & Voices of Recovery

Our Mission

- Changing the way addiction and recovery are understood and embraced through advocacy, education and leadership.

Our Vision

- We envision a world where the diverse voices of individuals and families affected by addiction are embraced and connected in communities, free from discrimination and injustice.



18

History of the Recovery Advocacy Movement

- **Recovery advocates from around the U.S. came together in St. Paul, Minnesota on October 5 – 7, 2001 for a National Summit.**
- **200 representatives of America’s community of persons in recovery from substance use disorders gathered to bridge the gap in public understanding of recovery to:**
 - End discrimination
 - Obtain equal healthcare treatment
 - Incorporate family recovery
- **Members of the US Congress joined people in recovery and allies to develop a national call to action.**



19

History of the Recovery Advocacy Movement

- On par to other rights movements throughout American history
- Faces & Voices of Recovery was founded in 2001 at this Summit
- Since this moment, the recovery movement has exploded around the globe.
 - “We’re in this together,” said U.S. Representative Jim Ramstad (R-Minn.) using his own story of recovery to challenge the recovery community to put “faces and voices on recovery” through the nation.
 - “This is the beginning of a civil rights movement,” U.S. Senator Paul Wellstone (D-Minn.), keynote address



20

The New Recovery Advocacy Movement

Social movement led by people in recovery from substance use disorders (SUD), their family, friends and allies

- Altering public and professional attitudes toward recovery, promoting recovery-focused policies and programs
- Supporting efforts to break intergenerational cycles of SUD and related problems



White, W.L. (2001). The new recovery advocacy movement: a call to service. Counselor, The Magazine for Addiction Professionals, 2 (6), 64-67.



21



Small Group Discussion 10 minutes

How do you see the history we have described as impacting your local area?



22

Advancing the Recovery Movement

- **Building strong, grassroots Recovery Community Organizations (RCOs)**
- **Linking these RCOs into a national movement**
- **Key strategies**
 - develop recovery leaders
 - offer opportunities for the recovery community
 - respond to community-identified recovery support needs
 - provide a forum for recovery-focused community service



23

Recovery Movement: Additional Strategies

- Celebrate recovery from substance use disorder (SUD) through recovery celebration events
 - National Recovery Month
<https://facesandvoicesofrecovery.org/2019/09/06/national-recovery-month-lets-build-a-movement/>
 - Recovery Research Institute <http://www.recoveryanswers.org/>



24

PEERS SPEAK OUT

Improving Substance Use Treatment Outcomes During COVID-19

Patients Lead: Identifying Meaningful Outcomes to Drive Substance Use Disorders Research and Care – Preliminary Findings December 2020

Community Catalyst is partnering with Faces & Voices of Recovery and the American Society of Addiction Medicine to increase the voices of people with substance use challenges and people in recovery in influencing research and improving treatment outcomes through "Patients Lead."

People were eligible to participate in the survey or focus group if they were at least 21 years old and had lived experience with substance use challenges, including addiction.

Top Priorities Identified So Far

Survey

- 800+ responses to a national online survey identified the top 3 outcomes people with substance use challenges and people in recovery want for themselves in "typical" (non-COVID-19) times. There are differences in top three outcomes by gender and race.
- During the COVID-19 pandemic, the third priority changed. Feeling safe in their surroundings also became an imperative.

Focus Groups

- 10 focus group participants identified different desired outcomes from survey respondents.
- Focus group participants maintained these top priorities during COVID-19 while adding other priorities.

<p>"Typical" Non-COVID-19 Times</p> <ol style="list-style-type: none"> 1 STAY ALIVE 2 HAVE IMPROVED QUALITY OF LIFE 3 STOP ALL DRUG / ALCOHOL USE 	<p>COVID-19 Pandemic</p> <ol style="list-style-type: none"> 1 STAY ALIVE 2 HAVE IMPROVED QUALITY OF LIFE 3 IMPROVE MENTAL HEALTH
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<p>"Typical" Non-COVID-19 Times</p> <ul style="list-style-type: none"> → CONNECTION TO CULTURALLY APPROPRIATE TREATMENT/SERVICES → REDUCING SUBSTANCE USE THROUGH HARM REDUCTION AND INDIVIDUAL PATHWAYS → CONNECTION TO SUPPORTIVE NETWORK OF COMMUNITY MEMBERS 	<p>COVID-19 Pandemic</p> <ul style="list-style-type: none"> → MAINTAINED "TYPICAL" NON-COVID-19 TIMES OUTCOMES → ACCESS TO TECHNOLOGY FOR / INSTRUCTION ON VIRTUAL SERVICES → CONNECTION TO A SUPPORT NETWORK → ACCESS TO CONTINUED CARE / FULL RANGE OF SERVICES
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Additional Strategies

Advocate for meaningful representation and voice for people in recovery and their families at all levels of policy making

<https://facesandvoicesofrecovery.org/wp-content/uploads/2021/01/Peers-Speak-Out-Summary.pdf>

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Recovery Community Support Program (RCSP)

SAMHSA created the RCSP grant program in 1998

The purpose of this program is to provide peer recovery support services via recovery community organizations to individuals with substance use disorders or co-occurring substance use and mental disorders or those in recovery from these disorders.

Originally allowed funding for advocacy

Shifted to recovery support services

The RCSP promotes a recovery-oriented system of care by bridging the gap between short-term episodes of treatment and long-term recovery that is grounded in community support.


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RCSP Pioneers














27

Definitions RCOs and RCCs


Recovery Community Organization (RCO)

- A recovery community organization (RCO) is an independent, non-profit organization led and governed by representatives of local communities of recovery.
- Phillip A. Valentine, William L. White and Pat Taylor, 2007



Recovery Community Center (RCC)


- Non-profit centers for the recovery community that offer local networks of non-medical, recovery support services.
- <https://www.recoveryanswers.org/resource/recovery-community-centers/>



28

What Do RCOs Do? The Organic Growth of RCOs

- conduct ongoing local recovery support needs assessment surveys or focus groups,
- organize recovery-focused policy and advocacy activities,
- increase recovery workforce capacity and expertise through training and education,
- carry out recovery-focused outreach programs to engage people seeking recovery, in recovery, or in need of recovery-focused support services or events to educate and raise public awareness
- conduct recovery-focused public and professional education events
- provide peer recovery support services (PRSS)
- support the development of recovery support institutions (e.g., education-based recovery support programs, recovery community centers, recovery cafes, recovery ministries, recovery-focused employment programs, recovery-focused prison reentry programs, etc.),
- host local; regional; or national recovery celebration events,
- collaborate on the integration of recovery-focused activities within local prevention; harm reduction; early intervention; and treatment initiatives



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RCO Best Practices

1. Nonprofit Organization
2. Led and Governed by the Recovery Community
3. Primary Focus is Recovery from Substance-Use Disorders
4. Grassroots
5. Participatory Process
6. Peer Recovery Support Services
7. All Pathways Toward Recovery
8. Diverse, Equitable, and Inclusive Policies, Practices, and Services
9. Recovery-Friendly Language
10. Code of Ethics and Grievance Policies




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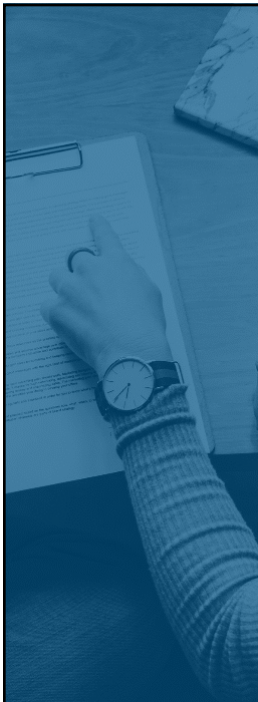
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- Established in 2011
- National network of local, state and national RCOs
- Links RCOs and their leaders with local and national allies and provides training and technical assistance to groups.
- Helps build the unified voice of the organized recovery community and fulfill our commitment to supporting the development of new groups and strengthening existing ones.



31



ARCO Members on the Map



<https://facesandvoicesofrecovery.org/arco/arco-members-on-the-map/>



32

Innovations in the Last Decade

- **Telephone recovery support services**
- **Digital- web-based and mobile apps**
- **Mobile peer support teams**
- **Recovery coaches in**
 - Child welfare agencies
 - Emergency departments
 - Drug court programs
 - Jail and prison programs
 - Faith based programs
 - more



33

Opportunities

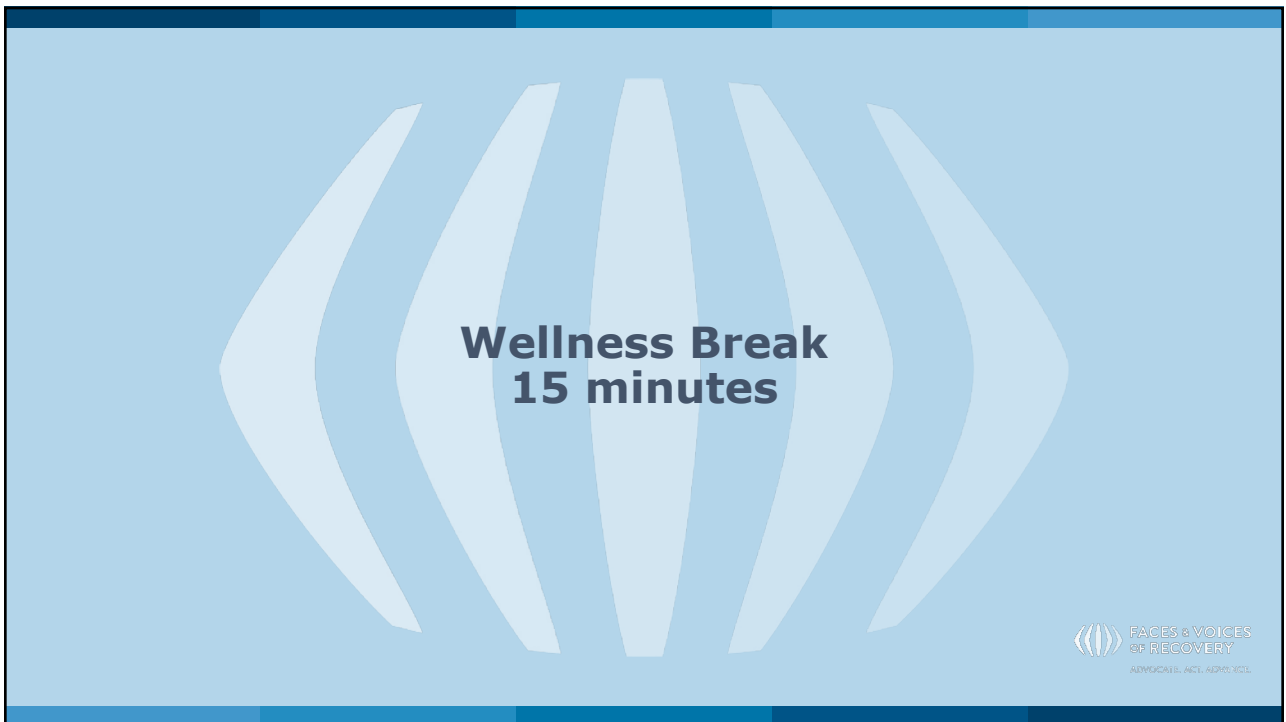
- **Eliminate stigma and discrimination**
- **Medicaid reimbursement for peer services**
- **Set aside in state block grants for Recovery Support Services**
- **Legislation**
 - Telehealth for peers
 - BIPOC set aside
 - CARA 2.0
 - Demonstration Grants
 - State Opioid Response Grants
- **Building Communities of Recovery (BCOR) – SAMHSA grants**
- **Strong partnerships with local entities**



34



35



36

RCO Start-up


Getting Your RCO Up and Running

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RCO Start-up: Overview

- **Visioning**
- **Resource and Needs Assessment**
- **Building Your Agenda**



38




Visioning

- **Establish a core group of stakeholders**
- **Develop a shared vision**
- **Create mission and vision statements**




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Visioning: Establish a Core Group

- **Authenticity of the recovery experience and voice**
- **Cultural diversity and inclusion**
- **Multiple pathways of recovery**
- **Participatory process**
- **Strength-based perspectives**
- **Recovery visibility and accountability**



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Visioning: Develop a Shared Vision

- **Reflect divergent views and ideas**
- **Outside facilitation is helpful in managing the process**
- **Think of your vision as a billboard**




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Create Mission and Vision Statements

- **Address need**
- **Core values**
- **Core programs**
- **Population(s) served**
- **Solutions provided**



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Small Group Exercise: Headline News Activity

- **In your small groups, you will pick one organization to describe success for. Pick someone to report out on your work.**
- **Agree upon a major accomplishment over the next year for this organization.**
- **Write a major headline for a local news outlet, print or social media.**
- **Write headlines for 2 articles that support your organization attaining the major accomplishment.**
- **Include 3 to 4 quotes from community members about your organization.**



43

Report Out

- **Each group – report Major and Supporting Headlines.**
- **Read Quotes and identify community members.**



44

Participatory Processes

- **What you just experienced is an experience of Participatory Process which can be used with a Board, Advisory Council or members of your workforce – employees and/or volunteers, or members of your local recovery community.**
- **Participatory Processes might include surveys, focus groups, listening sessions, and even the way you conduct your staff meetings, meetings with program participants in your RCO/ RCC programming, or your decision making.**



45

Characteristics of a Participatory Process

- **Peers are respected as experts in their own lives and learn from others who share similar experiences**
- **Participatory work requires self-reflection. You might ask, "Am I doing this out of self-interest?" or "Do I truly believe the community will benefit from this decision?"**
- **It is messy. There are no recipes for success.**
- **It requires trust in oneself and others. This type of trust takes both safety and time to develop.**
- **We continue to engage in the questions. When we live in the questions and re-evaluate our systems, practices, and processes on a regular basis, the Peer Participatory Process stays fresh and continues to grow.**
- **As the process unfolds, individuals become empowered and move toward ownership**



46

Headline News Exercise: Resource and Needs Assessment

- **Identify the Recovery Assets in your community.**
- **Identify your organization's needs in light of existing assets.**



47

Community Asset Mapping

- **Positive approach**
- **Substitute for traditional deficits focus on needs or problems**
- **Process to understand community resources, and individual capacities**
- **Promotes connections or relationships between individual and organizations**
- **Promotes community to use assets around a vision and plan to solve the community problem**



48

Examples of Community Assets

- **Individuals**
- **Non-profits-community based centers and civic groups**
- **Faith-based institutions and groups**
- **Publicly-funded colleges, libraries, hospitals, parks, agencies**
- **Private organizations**




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Questions to Assess Needs

- **What programs or services will you offer?**
- **What do you have already in place?**
- **What other resources are required?**
 - Funding
 - Human – people power
 - **volunteers, staff, etc.**
 - In-kind services or products
 - **non-monetary contributions**



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Build Your Agenda

- In the process of developing your vision and mission, your organization heard from the recovery community about its priorities through asset mapping and assessments.
- Your recovery community organization’s success will depend on your ability to develop and nurture relationships of all kinds.
- The most important relationship is with the recovery community – people in recovery, family members, friends and allies.
- How do we build nurturing relationships in our communities?




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51

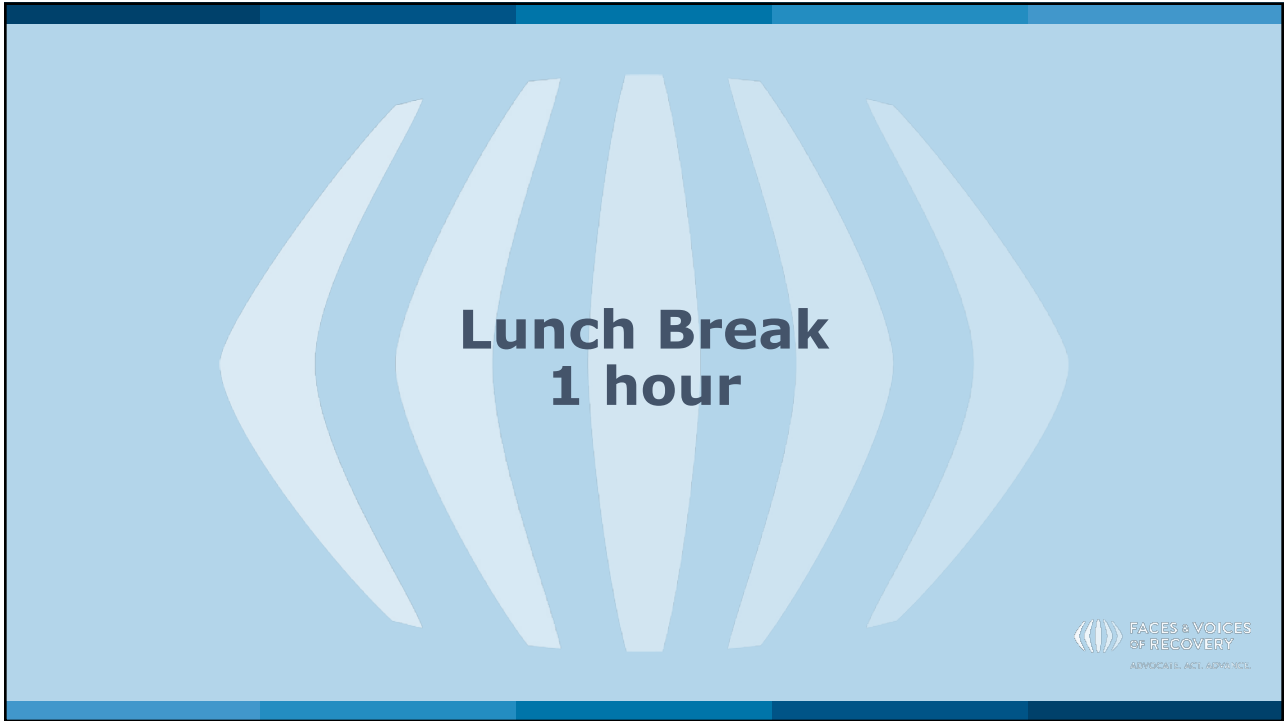


Questions?



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53



54

Good Governance: Overview

- **Effective board functioning**
- **Roles of board members**
- **Roles of committees**
- **Role of executive director**



55

Selection Process

- **By-laws that are clear about the role and responsibilities of the board as well as the process of selection**
- **Established terms**
- **Documentation of recruitment and selection process**
- **Executive director job description**
 - Responsibilities
 - Communication
 - Evaluation of board performance



56

Diverse Cultural Representation

- **Representative of and responsive to local communities of recovery**
- **Representative of and reflective of cultural diversity in the community**
 - **Examples**
 - **Age**
 - **Sexual Orientation**
 - **Gender Identity**
 - **Race and Ethnicity**
 - **Pathway of recovery**
 - **Skill Set – Professional Background**



57

Board Orientation and Training

- **Recovery principles**
- **Pathways to recovery**
- **Community strengths**
- **Community needs**
- **Current research and practices**
- **Conflicts of interest**
- **Public policy updates**
- **Programs and services**
- **Effective board service**
- **Understanding financial statements**
- **Cultural competence**
- **Ethics and Boundaries**
- **Fiduciary responsibility**



58



Small Group Discussion

How do you know that an organization you admire is being run by an effective board of directors?



59




Board Roles and Responsibilities

- **Policies and Practices**
- **Value and Purpose**
- **Accountability and Transparency**
- **Planning**
- **Fund Development**
- **Financial Oversight**
- **Support and Review of Executive Director**
- **Committees**




60




Role 1: Policies and Practices

- Ensures the organizational policies and practices are consistent with the principles of good governance and with the values of the local recovery community




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Role 2: Value and Purpose

- Establishes clear mission, vision and core values
- Utilizes participatory processes to identify values
- Records a written mission, vision and values statement




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Role 3: Accountability and Transparency

- **Transparent and accountable to those served, partnerships, stakeholders, funders and the greater recovery community**
- **Provide public notice of meetings in timely manner**
- **Agendas and minutes of board meeting widely disseminated**
- **Public access to written bylaws**
- **Legal corporate records in compliance with the law**




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Role 4: Planning

- **Engages in planning with the staff and community for sustainability to include the following:**
 - Strategic plan
 - Succession plan
 - Leadership development plan
 - Strategic communication plan
 - Public education plan



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Role 5: Fund Development

- Enacts policies and procedures that promote responsible fund raising
- Develops a gift acceptance policy
- Tax deductible contributions policy
- Donor protection and privacy policies



65




Role 6: Strong Financial Oversight

- Good stewardship of resources
- Policies and procedures to ensure prudent use of program resources
- Attend training on fiscal responsibilities as needed
- Ensures an annual audit performed by an external and certified public accounting firm
- Approval of annual budgets
- Receive and review of fiscal reports on a regular basis




66



Role 7: Support and Review of Executive Director

- **Progress**
- **Performance**
- **Goals and objectives**
- **Annual performance review and recommendations**



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Role 8: Committees

- **Executive committee**
- **Finance committee**
- **Nominating/board development committee**




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Executive Committee

- **Acts on behalf of the board during interim times between board meetings**
- **Comprised of the board officers and committee chairs**




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Finance Committee

- **Review annual budget prepared by staff**
- **Advises on financial activities and functions**
- **Reviews monthly or quarterly financial statements/ reports**
- **Monitors ethical practices, donor relations and cost effectiveness**



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Nominating/Board Development Committee

- Identification and recruitment of appropriate and talented individuals qualified to serve
- Board orientation and governance manual review
- Board capacity building
- Leadership development planning
- Executive director is a member of this committee as a voice in the nominating process



71

Executive Director: Role and Responsibilities

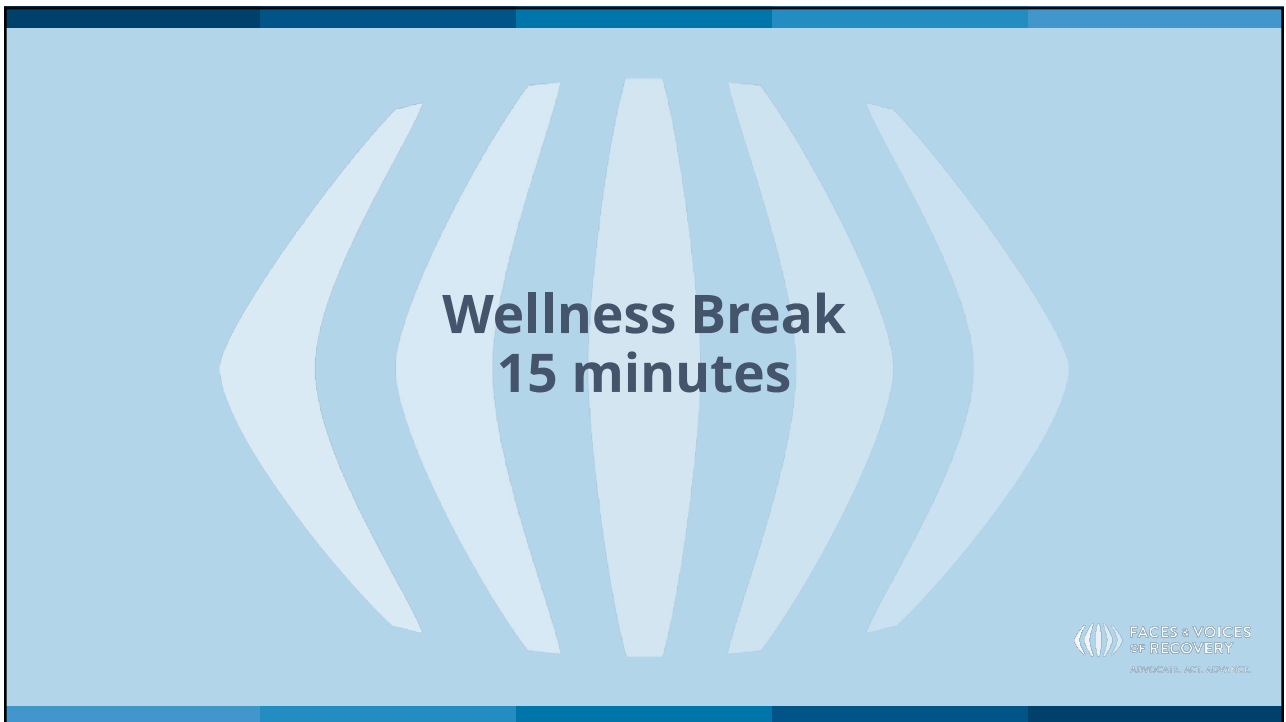
- Planning and operation of annual budget
- Establishment of employment and administrative policies
- Establishes and maintains partnerships
- Supervises staff
- Oversees committee meetings
- Oversees marketing and communication
- Review and approval of contracts
- Reports to the board on policy decisions, fundraising, and strategic planning
- Primary spokesperson



72



73



74

Ethical Issues


Understanding and preparing for ethical issues, risks and liabilities, mandated reporting and participant protection

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Ethical Issues: Overview

- **Difference between ethics and values**
- **Four categories of ethics in peer support services**
- **Exploration of individual values**
- **Defining peer values**
- **Clarifying ethical dilemma arenas**
- **Learning the process of ethical decision making**



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Ethics

- **A system of moral principles governing the appropriate conduct for a person or group.**
- **“Sustained vigilance in preventing harm and injury to those whom we have pledged our loyalty” – William White**
- **Example**
 - Peer support providers will keep all information confidential

77


Values

- **Types of beliefs a person has about distinguishing between right and wrong and good and bad.**
- **Examples**
 - Honesty, compassion, courage, integrity, fairness and respect

78

Boundaries

- **A personal or organizational evaluation and limit on what's acceptable and what's unacceptable in your life or or in the life of your organization.**
- **Personal Examples**
 - I won't lie for someone else
 - I don't allow a stranger to hug me
 - I don't allow smoking in my car
- **Organizational Examples**
 - We are honest in doing the work we do
 - We ask permission before touching someone
 - No smoking is allowed on this campus or organizational property




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Ethical Categories

- **Iatrogenic**
- **Fiduciary**
- **Boundary Management**
- **Multi-Party Vulnerability**



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Iatrogenic

- **Meaning:**
 - Unintended harm caused by treatment
- **Example:**
 - In the past, electroshock therapy and mandatory sterilization were used to treat addiction
- **Application:**
 - Peer support provider undermines other recovery paths due to personal belief that one path is the only way to recover



81

Fiduciary

- **Meaning:**
 - Term used to describe a relationship in which one person has assumed a special duty and obligation for the care of another
- **Application:**
 - There is a role differential between a peer and a peer support provider
 - It different from a friendship
 - One person has increased vulnerability and is looking to the ambassador for help



82

Boundary Management

- **Meaning:**
 - Encompasses the decisions that increase or decrease intimacy in a relationship
- **Application:**
 - Your organization will have specific boundaries that you need to uphold while participating in their program



83

Multi-Party Vulnerability

- **Meaning:**
 - A phrase that conveys how multiple parties can be harmed by what a provider of peer-based services does or fails to do
- **Application:**
 - An example would be if an ambassador breaks confidentiality it could hurt the person, family, the organization, etc.



84

Summary - Ethical Categories

- **Iatrogenic – Do no harm**
- **Fiduciary – Special duty or obligation for the other**
- **Boundary Management - increase or decrease intimacy**
- **Multi-Party Vulnerability – Multiple parties can be harmed by our actions**



85

Organizational Areas of Responsibility & Risk

- **Exploitation of the service ethic**
- **Coaches have minimal recovery time**
- **Organization does little to orient or train coach**
- **Organization permits or demands many hours from a volunteer or employee**



86

Peer Provider Conduct in Service Relationships

- Choice
- Emotional exploitation
- Financial exploitation
- Sexual exploitation
- Dual relationships
- Gifts
- Threat to community
- Boundaries of competence



87

Conduct in Relationships with Other Service Providers

- Responding to unethical conduct
- Representation of credentials



88



Conduct in Relationships with Other Agencies

- **Role clarity**
- **Confidentiality**
- **Predatory behavior**
- **Potential iatrogenic effects**



89



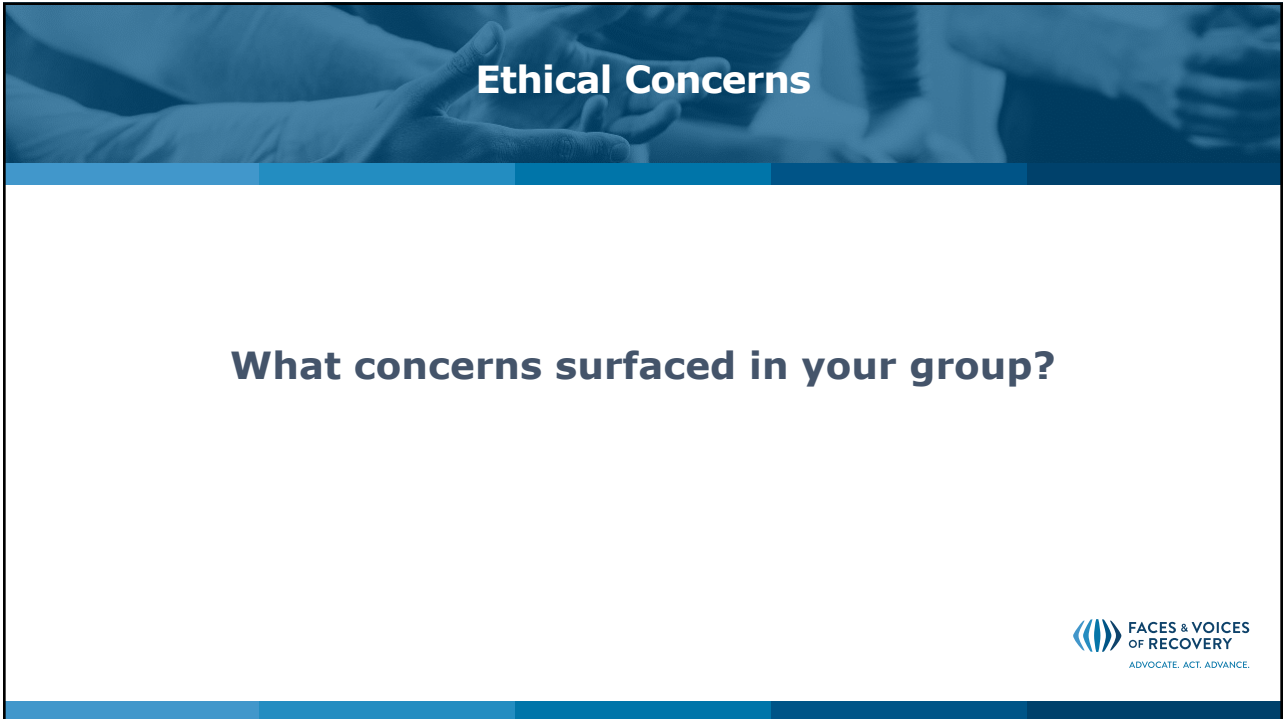
Small Group Discussion

In your small group, talk about your primary ethical concerns for an RCO in your community.

How can you create an organization to guard against this?




90



Ethical Concerns

What concerns surfaced in your group?



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Questions?



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92

What was the most important point, idea or suggestion for you today?

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93

Closing Discussion & Review

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94

RCO Bootcamp

Day 2

Presented by:
Jay Hughes
Catherine Lovvorn
Faces & Voices of Recovery
Adjunct Faculty

Sponsored by the Armstrong-Indiana-Clarion Drug and Alcohol Commission




NRI
National
Recovery
Institute

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95

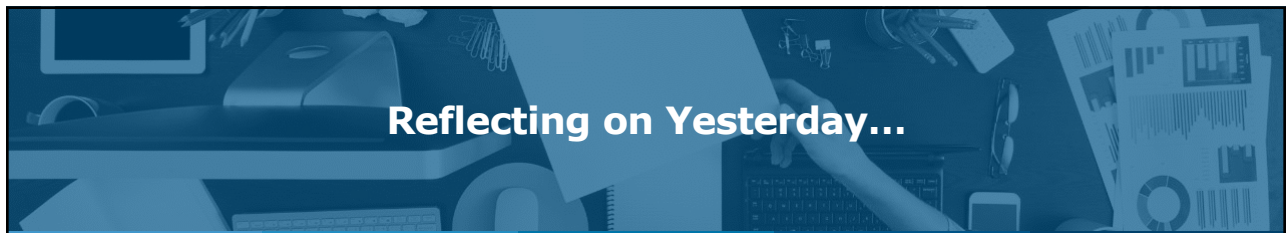
Day 2 Agenda

- Develop practices that foster organizational wellness.
- Define best practices for staffing RCOs and RCCs.
- Recognize compassion fatigue and identify self-care practices.
- Identify resources and practices for planning sustainability of your organization.
- Describe servant leadership, effective stewardship and the elements of advocacy.




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Reflecting on Yesterday...

- **What did you hear or think about from yesterday's sessions or last evening that can be helpful for an organization in your community?**
- **What can you do with this information or insight?**



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Keeping the Health of an Organization



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Keeping the Health of an Organization Group Discussion



**5-mins
to share**

- What are traits of good leadership?
- What are traits of good management?
- Is leadership and management the same?

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Keeping the Health of an Organization Management & Leadership

Management

“Management is getting the confused, misguided, unmotivated, and misdirected to accomplish a common purpose on a regular, recurring basis.”



Leadership

“Leadership is the creation of positive, non-incremental change, including the creation of a vision to guide that change—a strategy—the empowerment of people to make the vision happen despite obstacles, and the creation of a coalition of energy and momentum that can move that change forward.”








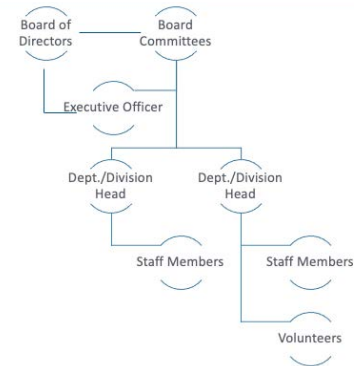
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<https://online.hbs.edu/blog/post/leadership-vs-management>

100

Keeping the Health of an Organization Tips: Management & Leadership

-  Utilize an organizational chart
-  Know your management style & be flexible
-  Praise & recognize
-  Team Building
-  Let others speak & hear them



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<https://online.hbs.edu/blog/post/leadership-vs-management>

101

Keeping the Health of an Organization Volunteer Recruitment & Retention

“Managing volunteers is similar to managing paid staff except that volunteers don’t expect to be compensated for their services.”

- Assessment
 - Find the best fit for the work that needs to be done.
- Benefits
 - What are the benefits for ongoing volunteer work (i.e., trainings, recognition, future employment opportunities)
- Tools
 - What tools do you provide to enable your volunteers to be successful?
 - Are you available or is there a point of contact who is accessible?

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<https://www.councilofnonprofits.org/tools-resources/volunteers>

102

Keeping the Health of an Organization Group Discussion



“Workplace health programs are a coordinated and comprehensive set of health promotion and protection strategies implemented at the worksite that includes programs, policies, benefits, environmental supports, and links to the surrounding community designed to encourage the health and safety of all employees.”
 – The Center for Disease Control

- **What programs have you seen or experienced that promote a healthy workplace?**



103

Keeping the Health of an Organization Aligning Organizational & Personal Wellness



<h3>Organizational Wellness</h3> <ul style="list-style-type: none"> • Culture • Core Values • Clarity • Communication • Care • Change <div style="text-align: right; margin-top: 10px;">  </div>	<h3>Personal Wellness</h3> <ul style="list-style-type: none"> • Physical • Emotional • Intellectual • Social • Spiritual • Environmental • Occupational <div style="text-align: right; margin-top: 10px;">  </div>
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<https://online.hbs.edu/blog/nost/leadership-vs-management>

104

Keeping the Health of an Organization Culture

- **Culture is the personality of the organization**
- **Workplace culture is the behavior that results when a group arrives at a set of generally unspoken and unwritten rules for working together**
 - Values
 - Beliefs
 - Underlying assumptions
 - Attitudes
 - Behaviors



105

Keeping the Health of an Organization Core Values



In a healthy recovery community organization, leadership recognizes wellness as a core value.


- person-centered care and services
- illness prevention and health promotion
- co-curricular learning opportunities
- public health leadership and expertise




<https://unh.edu/health/about-us/mission-vision-values>

106


Keeping the Health of an Organization Personal Values



Individuals bring personal values into the organization from their past experience and interactions with others these values are further influenced by organizational culture.



Individuals can hold both a personal value system and an organizational value system.



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Keeping the Health of an Organization Healthy Organizational Value Systems



- **A value system is consistent when its values do not contradict each other and can be used in all situations and are consistently applied**
- **Wellness value systems considerations**
 - Leadership models are consistent in behavior and align with wellness core values
 - Use of participatory processes help determine how core values are used to establish full engagement from staff, volunteers, the population you serve and stakeholders




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Keeping the Health of an Organization Clarity



- Clear and concise job descriptions
- Regular evaluations and supervision
- Individualized workforce development programs
- Policies and procedures for hiring process, new hire orientation, & performance evaluations
- Staff & volunteer recognition



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Keeping the Health of an Organization Communication



The number one issue in any organization is a communication breakdown.

A vital component of healthy organizational communication and risk management is a strategic communication plan that outlines how to communicate throughout the organization.



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Keeping the Health of an Organization Change

- Transparency
- Involvement

Discussion

- Communication
- Planning

Preparation

Implementation

A healthy organization focused on transparency and truth will take the time to not only inform the staff but also involve them in the change process and prepare them for transition.

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Keeping the Health of an Organization Care

Leadership is NOT a position or a title, it is Action and Example. – Cory Booker

- Awareness
- Model behaviors
- Mutually beneficial

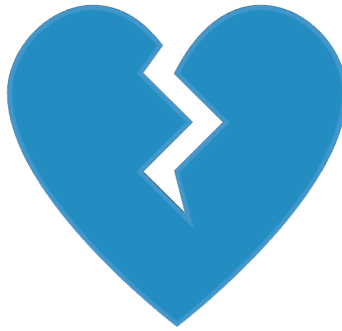
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Keeping the Health of an Organization Conflict

Types of conflict

- task
- relationship
- value
- interdependence
- issues with leadership



<https://online.rider.edu/blog/conflict-resolution-in-the-workplace/>

113

Keeping the Health of an Organization Application

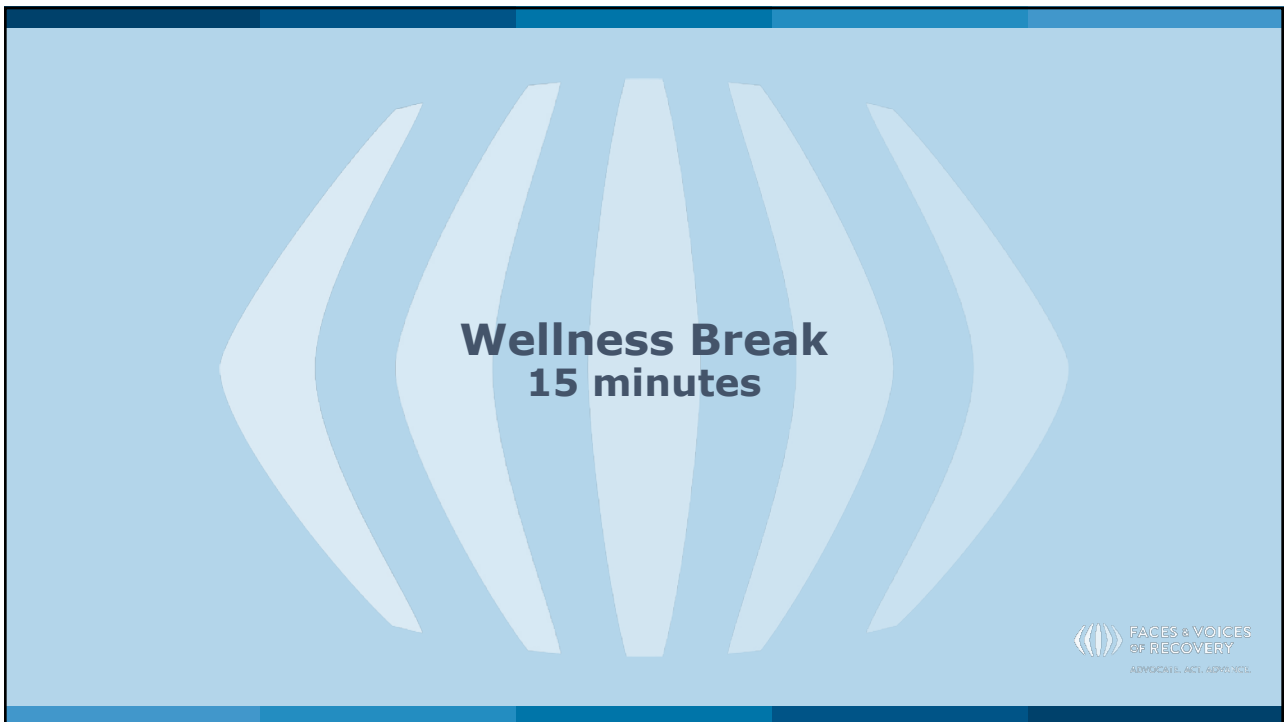
- Identify which of the 6 c's of organizational wellness can be used, and how they can be used, to negotiate conflict resolution for each of the conflicts we just discussed:
 - culture
 - core values
 - clarity
 - communication
 - care
 - change
- Types of conflict:
 - task
 - relationship
 - value
 - interdependence
 - issues with leadership



114



115



116

Staffing RCOs & RCCs


Considerations for staffing and
Providing Services and Supports

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117

Overview

- **Five Factors Impacting Staffing**
- **Six Key Roles**
- **Supervision in a Recovery Setting**
- **Leadership Development**
- **The Workplace We are Creating**




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118




119

- ### Factors Impacting Staffing
- **What services will you be offering?**
 - Peer Recovery Support Services, Training and Public Education, Advocacy
 - How will you be providing these services? In-person, by phone, virtually using technology?
 - **Where will your staff administer and offer training and services?**
 - Meet with the peers you serve? Host meetings and gatherings? Provide office space? Store and Distribute resources you provide, e.g. clothing, food, Narcan, health and wellness supplies?
 - **What equipment and technology do you have available?**
 - Computers? Telephones? Desks? Chairs? Tables?
- 

120

Factors Impacting Staffing

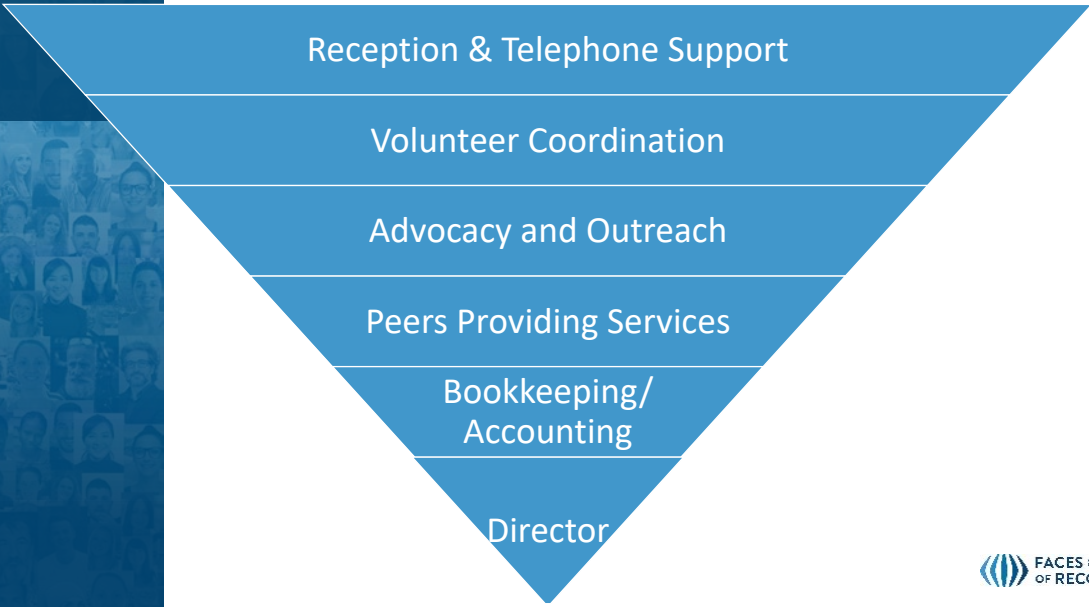
- **Who will provide supervision and oversight?**
 - Important elements of supervision. Establishing a recovery-friendly workplace.
- **What are your funding sources?**
 - Established funding? Possible funding?
- **What else?**




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Six Key Roles



- Reception & Telephone Support
- Volunteer Coordination
- Advocacy and Outreach
- Peers Providing Services
- Bookkeeping/
Accounting
- Director



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122

Reception & Telephone Support

- **These roles bridge between services and administration!**
- **The face of your organization – often the first person the public encounter representing your organization.**
- **Be clear about the messages you want/ need the representative to provide, reflecting your values, mission and vision.**
- **Scripts can be helpful to begin with.**
- **What skills and talents will deliver your message by phone? In person?**



123

Volunteer Coordination

- **When deploying volunteers, an RCO/ RCC needs someone to recruit, accept, assess, train, and assign volunteers to placements.**
- **Skills needed include clear communication, ability to interview and assess interviewees, represent the RCO/RCC' mission, vision, and values, organization and coordination of events, computer skills to support these.**
- **Ability to inspire and motivate, proven decision-making skills, ability to evaluate and deliver feedback without alienating.**



124

Advocacy and Outreach

- **Based on your mission, vision, values and the needs of your community, identify the messages are you're looking to deliver through advocacy and outreach and your desired outcomes.**
- **What lived experiences will support the messages and the delivery of these messages?**
- **What skills are needed for these efforts?**
- **What safety concerns need to be factored in for the outreach or advocacy work?**



125

Peers Providing Services

- **The skills and talents that are needed for the services you will be providing will depend on those services.**
- **You will need to assess the capabilities of your organization to provide training and support for on-the-job learning in order to identify the qualifications needed by those you engage to provide the services.**
- **Will you require certification? What are your funders' expectations about this? Does certification need to be "in process" or complete?**
- **Hiring people who those you provide services for can identify with is helpful for engagement. Lived experience, gender, race and sexual identity/ orientation can all support "relatability."**



126

Bookkeeping/ Accounting

- **Bookkeeping/ Accounting of all resources passing through the organization is critical.**
- **May be provided through trustworthy volunteers or a board member.**
- **Oversight by Executive Director and Governing Board is always needed.**
- **Transparency and competence are essential.**
- **Once the organization is able, independent audits help establish and sustain credibility**



127

Executive Director/ CEO/ Director

- Planning and operation of annual budget
- Establishment of employment and administrative policies
- Establishes and maintains partnerships
- Supervises staff
- Oversees committee meetings
- Oversees marketing and communication
- Review and approval of contracts
- Reports to the board on policy decisions, fundraising. and strategic planning
- Primary spokesperson



128

Small Group Exercise

- **In your small group, discuss what roles, if any, are already filled for the RCO you are representing or envisioning.**
- **What roles discussed will be needed for the RCO you are envisioning?**
- **What additional roles will need to be fulfilled?**
- **How do you envision filling these roles?**
- **What challenges do you anticipate?**



129

Eight Principles of Supervision in a Recovery Setting

- Is an action not a role
- Strength-based process in which there is mutual accountability
- Enhances and develops the unique knowledge and skills necessary for successful peer practice
- Provides a safe space to address ethical dilemmas and boundary issues
- Engages peer practitioners in strengthening the peer recovery support service (PRSS) program
- Fosters an organizational environment and culture that is conducive to recovery
- Clarifies organization systems, structures, and processes
- Supports self-care



130

Benefits of Peer Leadership Development

- Strengthens the organization
- Assists with sustainability and longevity
- Generates ownership of programs and services
- Builds team morale
- Shared workload
- Assurance of ethics and best practices
- Sense of purpose



131

Five Signs of Emerging Leaders

- They have a unique perspective on something universal that clicks with a group of people to help them move forward
- They have an inner drive to serve people or the world
- They are highly motivated and inspire others with your enthusiasm
- They are inspired by expansiveness, but you are focused on one thing
- They love people



132

Modes of Peer Leadership Development

- Training
- Virtual learning
- Role playing
- Shadowing
- Peer advisory boards
- Advocacy opportunities
- Co-facilitation of groups
- Committee work
- Event planning



133

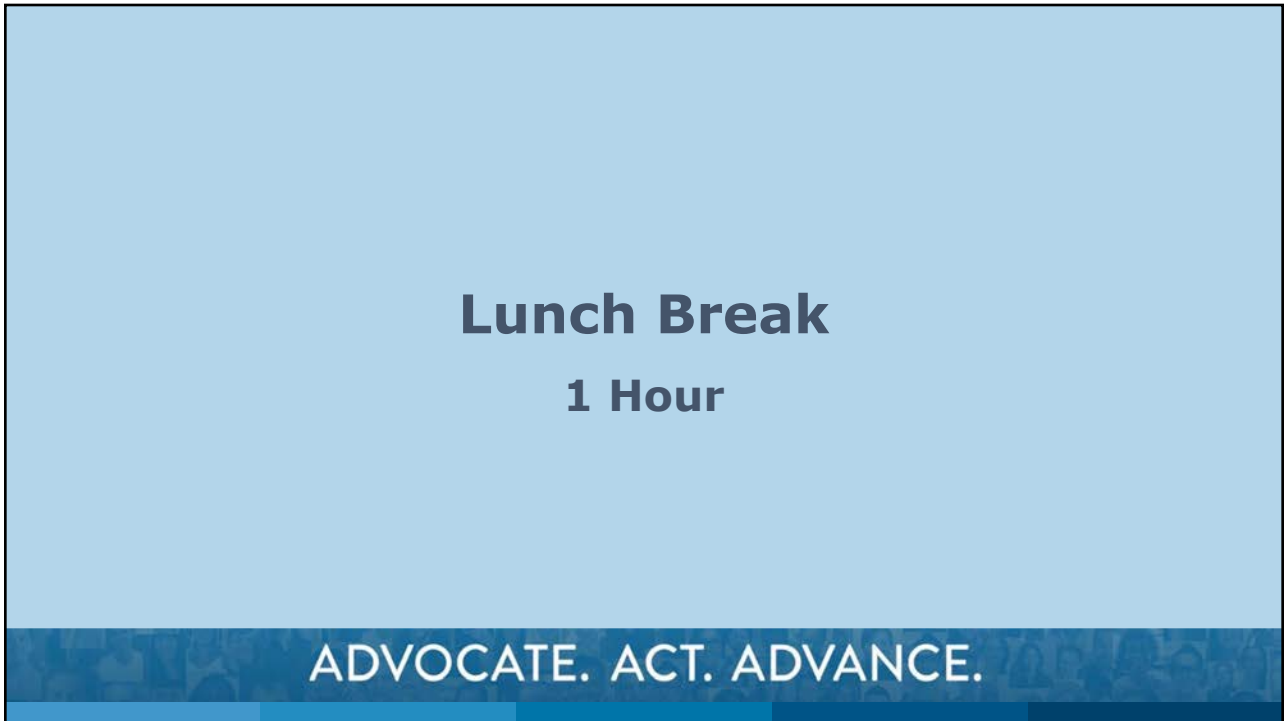
We Are Creating Recovery-Friendly Workplaces

- Safe, trusting work environment that promote learning alliances with team members
- Shared responsibility ensuring that the peer program participants' and recovery communities needs are addressed
- Congruence with the values and philosophy of the organization
- Commitment to on-going peer-fessional development and active promotion of professional growth and development
- A rigorous process for addressing ethical and legal responsibilities

134



135



136

Self-Care and Compassion Fatigue


the impact of burnout and secondary
trauma

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Compassion

- “A feeling of deep sympathy and sorrow for another who is stricken by suffering a misfortune, accompanied by a strong desire to alleviate the pain or remove its cause”




138



Fatigue

- **“Extreme tiredness, typically resulting from mental or physical exertion or illness”**



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Trauma

- **Physical, sexual, emotional abuse or neglect**
- **Natural disasters**
- **Incarceration**
- **Historical Trauma**
- **Losing a child**
- **Termination of parental rights**
- **Interpersonal violence in the home**
- **Life threatening medical conditions**
- **Involuntary hospitalization**
- **Poverty**
- **Addiction**
- **Community violence**
- **Without permanent shelter**




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140

What is it?

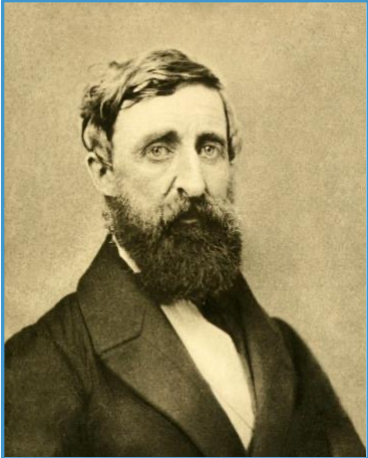
- **Definitions**
 - Adverse reactions of workers who seek to aid trauma survivors
 - Service-related secondary exposure to stressful events



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Henry Thoreau Quote



“We are torn by two powerful and opposing drives, to enjoy the world and the urge to set it straight.”

- Henry Thoreau



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Secondary Trauma Stress

- Absorbing trauma and stress of others
- Can emerge suddenly with little warning
- Recovery easier to obtain than from burn-out
- May lead to burnout




143

Burnout

- Subtle over time
- A process, not a fixed condition
- Chronic exhaustion*
- Leads one to believe he or she is not meant for this type of service work
- Feelings of being ineffective, callous, negative, cynical emotional absence, sarcastic and feeling of being "stuck"
- Creates a sense of guilt and shame




144




Considerations

- **Strategies that enable us to ...**
 - Maintain the highest of ethics
 - Hold integrity
 - Maintain fiduciary responsibility
 - Understand that we cannot heal anyone
 - Be whole and healthy while doing this work




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Special Vulnerability of PRSS

- **Empathy**
- **Personal Experience with Trauma**
- **Unresolved Trauma of the Worker**
- **Children's Trauma**



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Secondary Trauma Stress

- **People can be traumatized without actually being physically harmed or threatened by harm**
- **Listening to and learning about violent personal assault, serious accidents, sudden death, violent acts and extreme hardship by people we are connected to can cause secondary stress reactions**
- **Secondary Traumatic Stress can “infect” an entire organization or system after first appearing in only one staff member**
- **Secondary Traumatic Stress is a by-product of caring for traumatized people**
 - Charles R. Figley



147

Group Exercise: Symptoms of Secondary Traumatic Stress

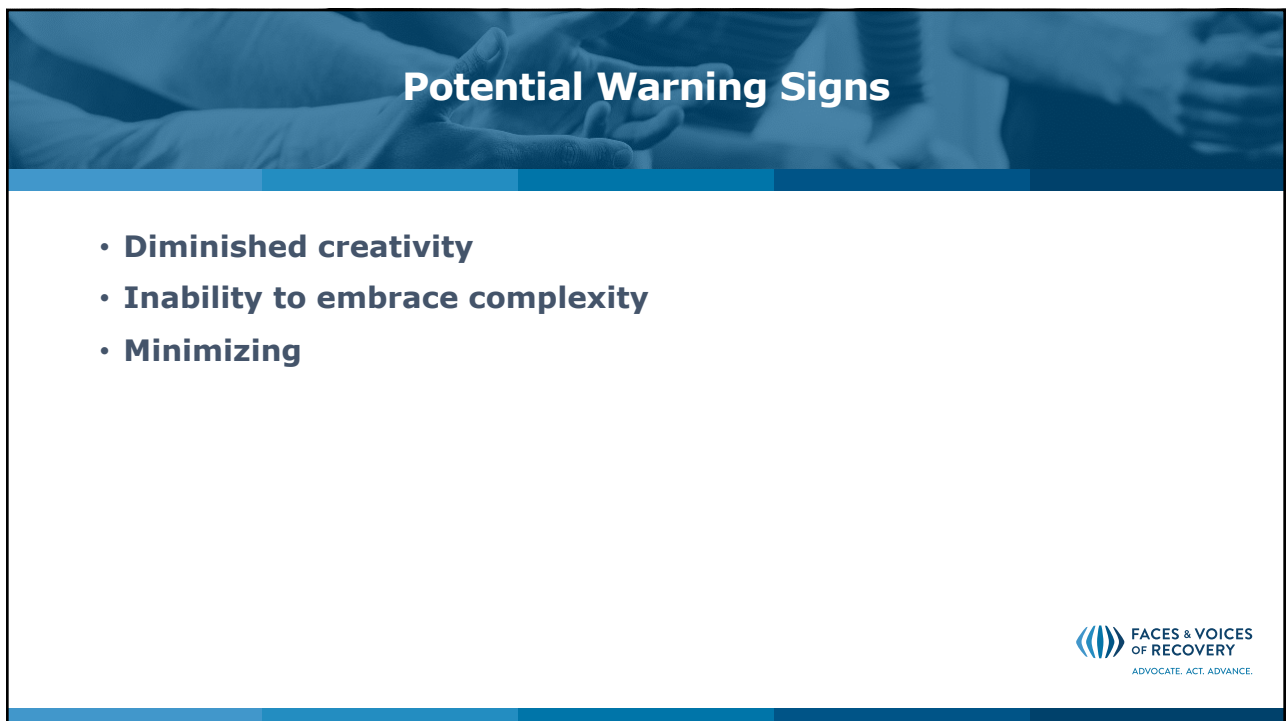
- **Intrusive Symptoms**
- **Avoidance/Numbing Symptoms**
- **Arousal Symptoms**
- **Physical Symptoms (Gentry 1999)**




148



149




150




Potential Warning Signs

- **Chronic exhaustion**
- **Physical ailments**
- **Avoidance**
- **Inability to listen**




151




Potential Warning Signs

- **Feeling helpless and hopeless-can't do enough**
- **Feel the need to rescue, heal or fix**
- **Hypervigilance**




152




Potential Warning Signs

- **Dissociative moments**
- **Sense of persecution**
- **Guilt & Fear**




153



Potential Warning Signs

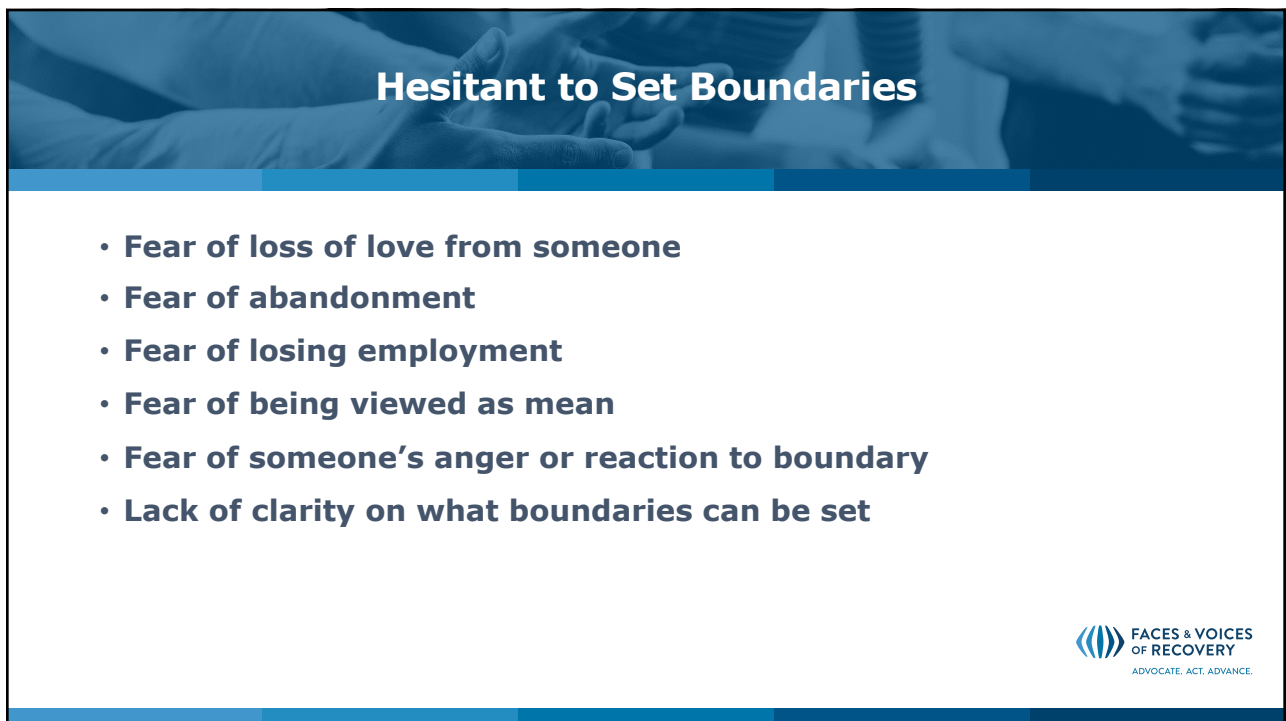
- **Anger and Cynicism**
- **Inability to Empathize**
- **Addictions**
- **Grandiosity**




154



155




156




Over-Achievers

- **High expectations and standards**
- **Busy all of the time**
- **Take on more responsibility when feeling stressed**
- **Feel others are not taking enough responsibility**
- **Consider being busy as a sign of success**




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Stressful Home Life or Life Situation

- **Children**
- **Taking care of self or a family member who has a chronic disease**
- **Taking care of an aging parent**
- **Financial difficulties**
- **Divorce**
- **Death**
- **Single Parenting**



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Systemic Stress

- **Systemic Stress**

- Systems of stress that may be impacting one's personal family and inner circle of friends
- Normalized systems you are already living within on a daily basis
- Be aware of what's happening in the world around us

- **Systemic Racism**

- Advocacy within your own organization as a minority leader or when the population served underrepresented within your agency can have a negative impact and lead to exhaustion.
- Has your agency remained diligent in creating an anti-racist culture? The stress associated with driving such efforts without community and inner agency support can lead to fatigue.




159

Minimal Self Care

- **Takes no time for self**
- **Puts others first**
- **Unhealthy eating**
- **Minimal social circle**
- **Numbing activities**
- **Isolation**
- **Lack of personal and professional boundaries**




160




Shift in Priorities

“Taking good care of you, means the people in your life will receive the best of you instead of what is left of you”

- Carl Byran




161



Closer Look

- **Care - to pay close attention to, to avoid harm**
- **Self care - pay close attention to your body, mind and spirit to make sure you are avoiding harm to yourself**



162

11 Steps to Better Self-Care

- If it feels wrong don't do it
- Say exactly what you mean
- Avoid being a people pleaser
- Trust your instincts
- Never speak bad about yourself
- Never give up on your dreams
- Don't be afraid to say no
- Don't be afraid to say yes
- Be kind to yourself
- Let go of what you can't control
- Stay away from drama and negativity as much as possible



163

15 Possibilities for Better Self-Care

There are many things we can do to better care for ourselves. We're going to look at 15 possibilities and we'll explore them in five broad areas:

- You might want take a step to do something to better manage your workload.
- You might want to take a step something to Enhance and nourish your inner life - feed your spirit.
- You might want to take a step to achieve better balance between work and the rest of life.
- You might want to take a step to better "re-create" energy and interest in your life.



164

Manage my Workload

- **Take something off your plate and don't replace it with anything.**
- **Delegate at work and at home.**
- **Learn to say no (or yes).**
- **Balance your schedule: intersperse easy with hard.**
- **Seek more and regular supervision. Ask for what you need.**



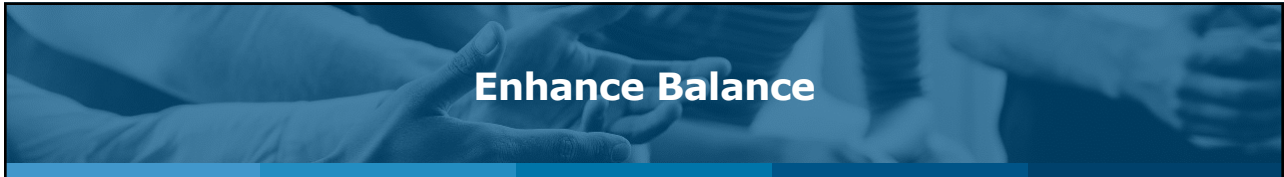
165

Enhance My Inner Life

- **Increase your spiritual or mindfulness practice.**
- **Increase your self-observations and self-awareness.**
- **Find a quiet and undisturbed time for yourself everyday.**
- **Assess your trauma inputs.**
- **Avoid falling into a victim mentality.**




166




Enhance Balance

- **Create transition rituals**
- **Cherish your family and friendships.**
- **Attend education and training outside of your work.**




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Increase my Recreational Activities

- **Add more movement and nourishment to your life.**
- **Engage in short term goal-oriented hobbies or sports.**

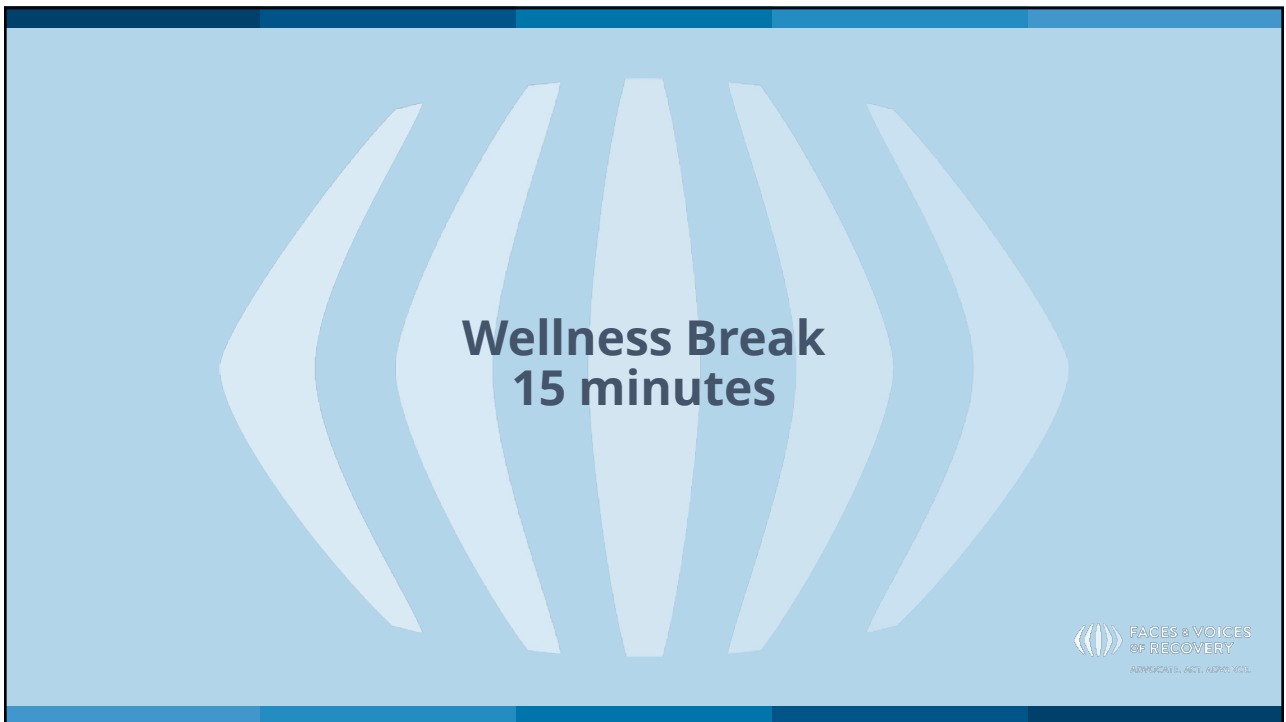


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169



170

Sustainability Planning

Keeping the doors open for the long-term through funding, data, leadership, structure and programming

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Stability Supports Sustainability

- **Sustainability refers to the durability and health of your organization long-term**
- **Consistent improvement and support of your organization is vital for its long-term success**
- **Stability is accomplished through**
 - Reliable Funding
 - Strong Leadership
 - Sound Organizational Structure
 - Effective Programming

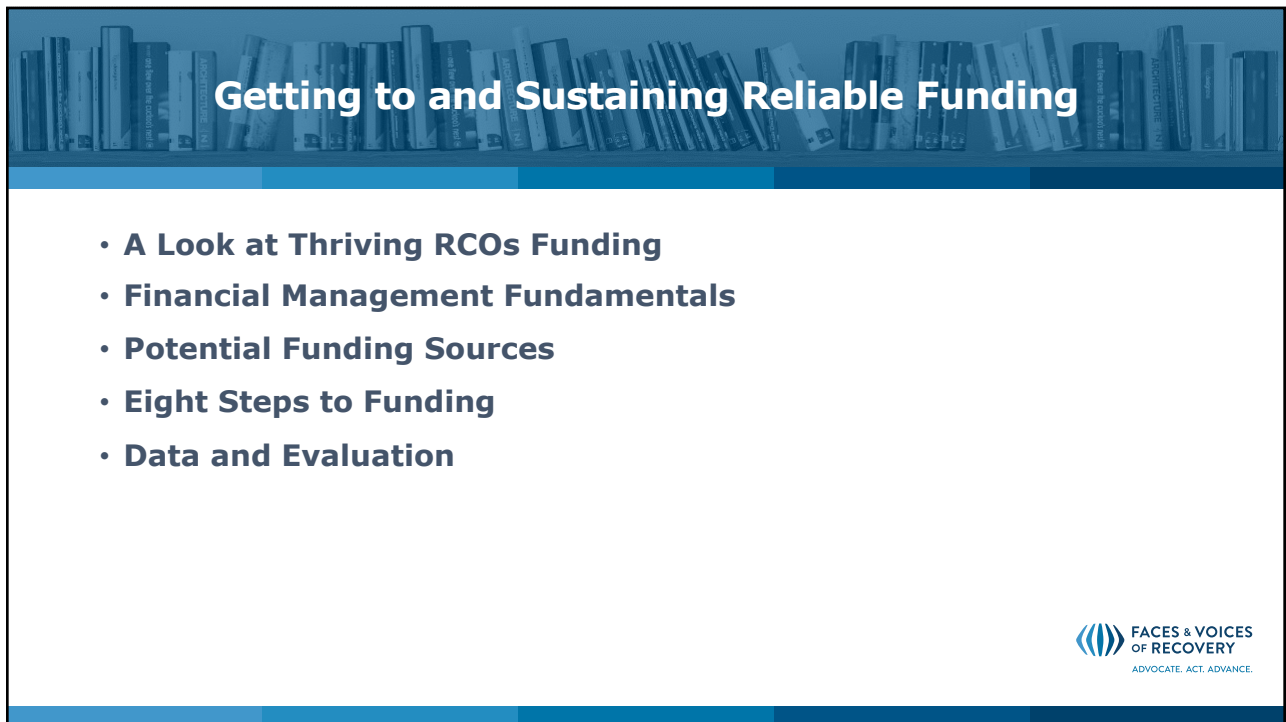


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173



174

Looking at Funding: Examples from Thriving RCO's

- **The Georgia Council on Substance Abuse**
 - Majority of its funding from the SSA – state contracts
 - Earned income from Trainings, Technical Assistance, Consultation
- **The Zone – Marietta, GA**
 - Balance of funding sources
 - **1/3 Private/Corporate Donations**
 - **1/3 Grants including: Government and Foundations**
 - **1/3 Fundraising: Annual Gala**
 - Plus earned income from thrift store and coffee shop
 - Partnership with the city for space



175

Looking at Funding: Examples from Thriving RCOs

- **FAVOR Greenville Funding Sources**
 - Individual donations
 - Corporate donations
 - United Way
 - Community foundations
 - Other social/philanthropic foundations



176

Financial Management Fundamentals

- **Attain incorporation.**
- **501(c) (3) status - this is a nonprofit organization in compliance with the federal law of the United States Section 501(c).**
 - Needed to become a member of the Association of Recovery Community Organizations.
 - Will enhance attractiveness to private donors and to qualify for most grants.
 - Note: Section 501(c)(3) organizations are prohibited from supporting political candidates
- **Bank Account – You’ll likely need some documents**
 - Articles of incorporation, 501(c) (3) documentation, Employee Identification Number (EIN)
- **Register with State before soliciting contributions.**



177

Financial Management Fundamentals

- **Components for reliable financial management**
 - Keep track of all revenue and payments – set up codes to track back to agreements and contracts.
 - Identify person who is responsible for tracking money in and money out.
 - Regular financial reports to Board of Directors.
- **Tax Returns – while non-profits are exempt from paying federal taxes, they will be required to file a tax return each year.**
- **External Audit – an annual systematic examination of the organization’s financial records conforming to government laws and established rules of accounting.**
 - Will be required by many grants and contracts with funders and/or donors.



178

Potential Funding Sources

- **Single State Authority, Community Block Grants, Medicaid**
- **SAMHSA**
- **County/City government partnerships**
- **Earned Income**
- **United Way**
- **Community Foundations**
- **Corporate Support**
- **Individual Donors**
- **Rotary, Lions and other philanthropic clubs**



179

Steps To Funding

- **Step 1 - Register your non-profit organization with the state agency responsible for fundraising registration.**
- **Step 2 – Identify Organizational Fit.**
 - When applying for grants, make sure you understand and qualify for the funding.
 - Approach other potential donors individually, preferably in person. Explain what their money can do and that any amount will help.
- **Step 3 - Give people information about your nonprofit organization and why there is a FIT.**
- **Step 4 - Share stories about your organization’s past successes on your website or social media.**



180

Steps To Funding

- **Step 5 - Build relationships with individuals and corporations that might share something in common with your nonprofit.**
- **Step 6 - Provide proof of your organization's nonprofit status.**
- **Step 7 - Tell contributors what you intend to do with the donations it receives and then keep them informed about the changes their contributions have made possible.**
- **Step 8 - Let past donors know how much the organization appreciates their gifts.**




181

Data and Evaluation: The Process

- **Collect data along the way to evaluate how effective your services and/or programs are to make improvements**
- **Collect stories**
- **Use evaluation tools to reconsider where and how funds should be allocated**
- **Keep funders, community partners, policymakers and stakeholders informed about the progress your organization is making through evaluation reports**
- **Continually evaluate your financial activities**




182




Small Group Exercise

In your small group, discuss the data you believe you will need to collect for an RCO in your community. Why? How will you do it?




183



Think Outside the Box

- **Donation of services**
- **Donation of space**
- **Collaborative events**
- **Donation of time**
- **Donation of expertise**



184



185

Elements of Strong RCO Leadership

- **Elements of Leadership**
 - Exercises Servant Leadership
 - Collaborates with Others
 - Leads Toward a Shared Vision
 - Follows Through
 - Develops Future Leaders – Succession Planning & Developing Leaders for the Movement.
- **People support what they help to create!**

186

Exercises Servant Leadership

- **The servant leader is servant first...it begins with the natural feeling that one wants to serve, to serve first-** Robert K. Greenleaf
- **Philosophy and set of practices that enriches lives of individuals and families, builds better organizations and ultimately creates a more just and caring world**
- **Care for people, serve each other-a rock on which a good society is built**



187

Collaborates and Builds Relationships

- **Engages others in decision making at all levels.**
- **Listens and hears what others are contributing.**
- **Acknowledge that each community has services and supports that are working – discover them and build partnerships with them.**
- **Develop and implement an approach for community forums or listening sessions.**
- **Let those who engage know how you are incorporating their input and why.**



188



Small Group Exercise

Based on your experiences, what are the benefits of building relationships in recovery?

What skills have you developed in relationship-building that can be used in developing an RCO?



189



Leads Toward a Shared Vision

- **Develop and OWN the organization's Mission and Vision, developed through engagement with recovery community.**
- **As the organization develops, "filter" programs and commitments for the organization through the mission and vision. Be aware of "Mission Creep".**
- **Keep your Board of Directors (BOD) and key partners engaged as the organization develops and you decide on programs and commitments. Know when the BOD needs to be involved in decision making.**



190

Follows Through

- **On-going communication is critical.**
- **Let your staff, BOD, volunteers and key partners know when you are changing direction or taking on new programs.**
- **Always let funders know about progress and obstacles you are encountering in commitments or deliverables.**
- **As you expand and grow, track your organization's capacity.**



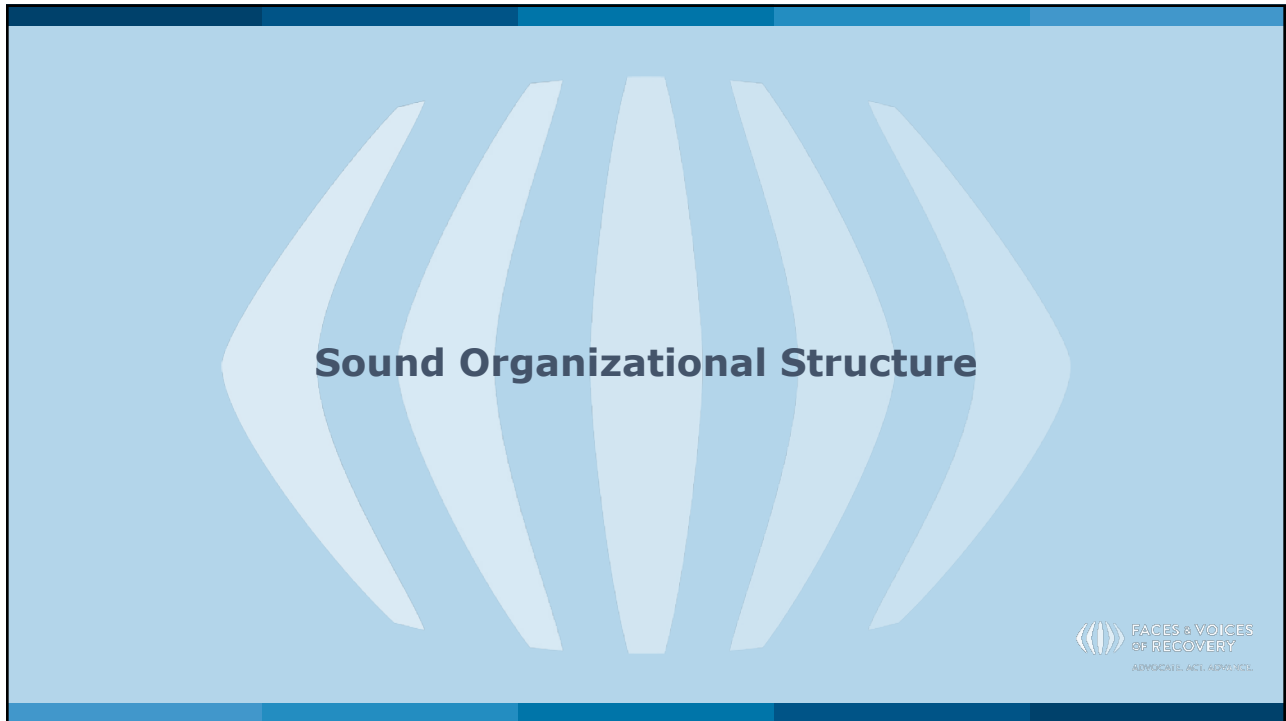
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Develops Future Leaders/Succession Planning

- **Encourage and facilitate staff participation in development and leadership encourage trainings – outside of organization.**
- **Grow leaders – allow staff to develop abilities.**
- **Cross-Train staff.**
- **Who can fill in for ED as needed.**
- **Develop leaders not only for your organization but also for the movement – nationally and globally.**



192



193

Organizational Structure

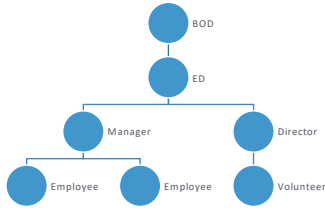
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graph TD; BOD((BOD)) --- ED((ED)); ED --- Manager((Manager)); ED --- Director((Director)); Manager --- Employee1((Employee)); Manager --- Employee2((Employee)); Director --- Volunteer((Volunteer))
```

- **Starting out – Structure usually very limited**
- **As the organization develops, how do you assure:**
 - Strong communication?
 - Shared vision?
 - Common sense of values and connection to mission?
 - Accountability?
 - Program Effectiveness?

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Cautions within Organizational Structure



- **Too many “Directors” – top heavy**
- **Too many “Levels” – in smaller organizations, stay “flat”**
- **No sense of shared skills and talents for “Levels”**
- **No structure! – Accountability?**
- **Job descriptions!**
- **Unclear linkage to Programming**



195

Questions?



196

Effective Advocacy for RCO's

Furthering the field through servant leadership, effective stewardship, advocacy and evidenced based practices.

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Advocacy

“The act or process of supporting a cause or purpose”

Miriam-Webster Dictionary

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Advocating for the Recovery Community

- **The organization engages in the highest level of service to the recovery community on a local, regional, and national level.**
- **Practices servant leadership**
- **Demonstrates effective stewardship**



199

What is Servant Leadership?

- **The servant leader is servant first...it begins with the natural feeling that one wants to serve, to serve first**
 - Robert K. Greenleaf
- **Philosophy and set of practices that enriches lives of individuals and families, builds better organizations and ultimately creates a more just and caring world**
- **Care for people, serve each other - a rock on which a good society is built**



200

Servant Leadership Characteristics

- **Opposite of “traditional” or top-down leadership**
- **Shared power versus the exercise of “top-down” power**
- **Puts the needs of others first**
- **Helps people develop and perform as highly as possible**
- **Leader exists to serve the people instead of the people serving the leader**
- **Unlocks purpose and ingenuity in those around them**



201

What is Effective Stewardship?

- **The careful and responsible management of something entrusted to one’s care.***
- **As effective stewards we provide:**
 - Guidance, direction, administration, governance
- **The resources we are “stewarding” are not ours but are entrusted to us!**



*Merriam-Webster Dictionary

202

Characteristics of Effective Stewardship

- **Allows an organization to continually develop to meet the needs of an ever-changing world**
- **Acting with the understanding that leadership is a temporary role which is outlasted by the lifespan of the organization**
- **Actively preparing for the organization's future**
- **Focusing on the well-being of each person within the organization**
- **Ensures good interaction of the team**
- **Ensures that the mission and vision remain current**




203

Elements of Advocacy

- **Organization engages in exemplary advocacy for people in recovery at a local, regional, and national level, using a variety of strategies**
- **Participation in the national movement/national efforts to:**
 - Help individuals and families get the help and resources they need to recover
 - Promote long-term recovery
 - Change policies that discriminate against people in or seeking recovery
 - Provides opportunities for peers to share their stories




204




There is Power in Numbers! Build a Coalition

- **Who are your allies?**
- **What are some combined actions you could take?**




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Coalition Building

- **Become an active builder of local coalitions addressing the following:**
 - Substance use disorder
 - Treatment
 - Recovery
 - Mental health
 - Health care
 - Housing
 - Other issues that impact lives of people in recovery
 - Benefits from the experience of people in recovery




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Coalition Building


- **Work to deepen knowledge and understanding of assets and issues that exist in the community**
- **Facilitate community readiness and increase community capacity to support recovery**
- **Encourage and enhance community investment in recovery and resources for recovery**



207



Who Should be at the Table?



208

Gather Evidence – Share with Others

- **Organization Evidence-Based Practices**

- Uses best available evidence to make informed decisions about programs, services and activities
- Commitment to sharing with and learning from other recovery community organizations around the country



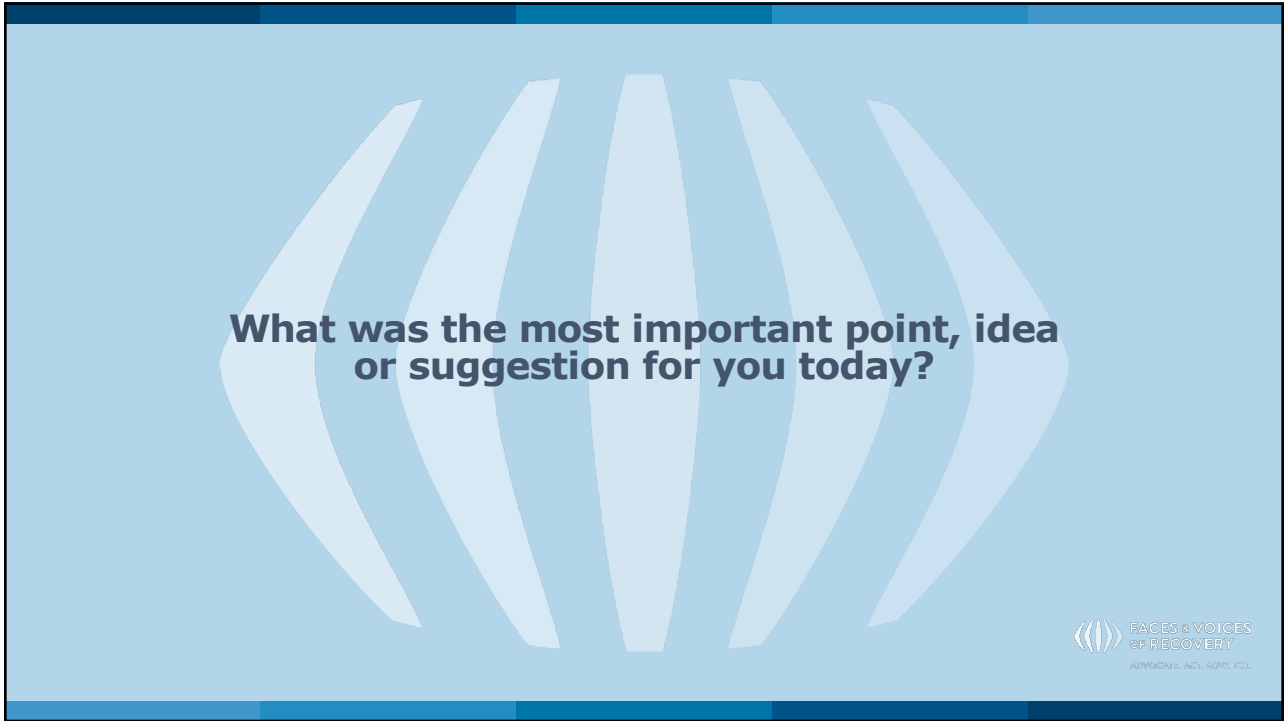
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What Does that Look Like?

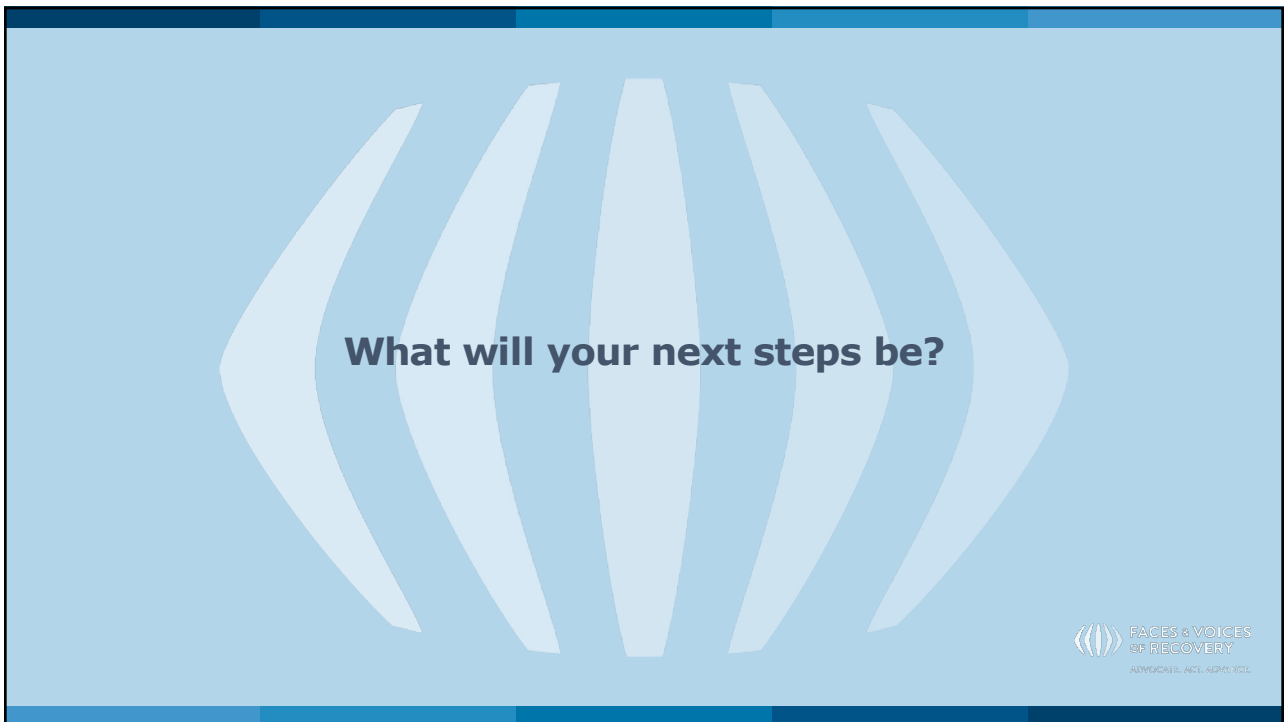
- **Commitment to the well-being, rights and dignity of participants**
- **Keeps current with trends in peer service**
- **Has process for periodic review of research on recovery**
- **Promote skills, attitudes and commitment among staff and volunteers**
- **Promotes ongoing workforce development**
- **Searches for new and more effective ways to be of service**
- **Participates in research studies that will provide evidence on the efficacy of peer services**



210



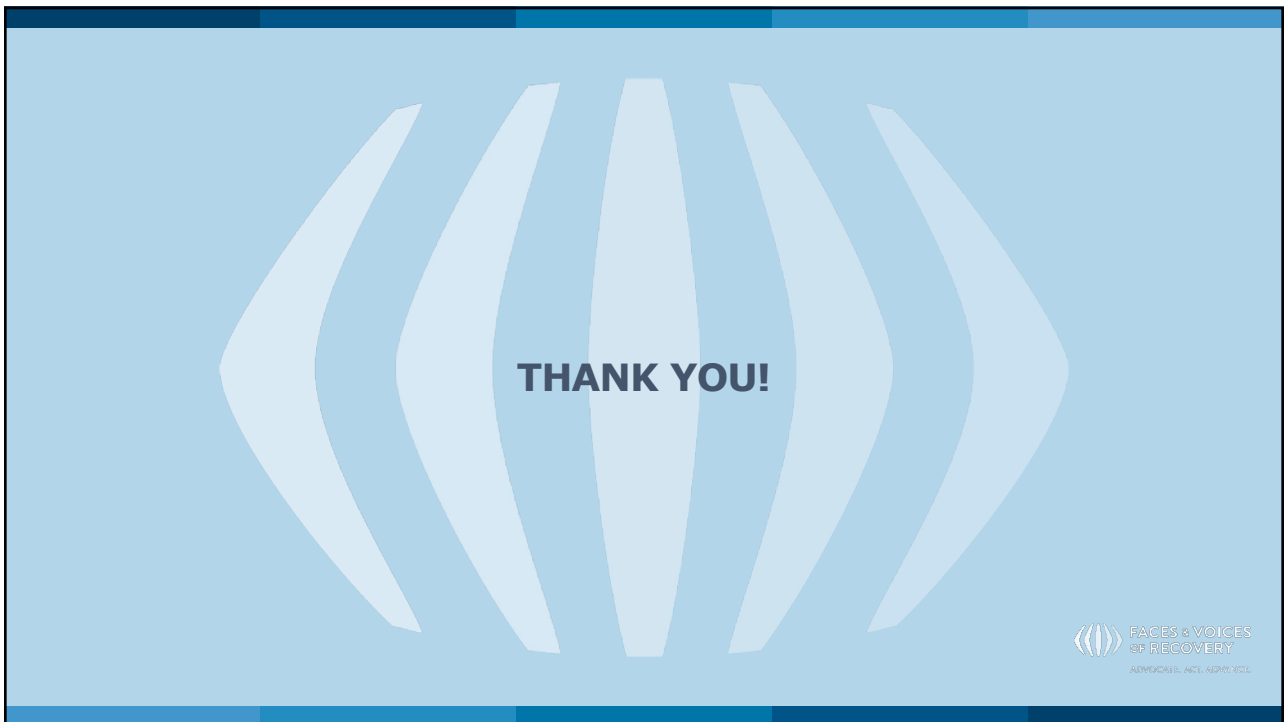
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212



213



214



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