SUBJECT MATTER EXPERT (SME) REPORTING GUIDE FOR TECHNICAL ASSISTANCE (TA)

FACES & VOICES OF RECOVERY

ADVOCATE. ACT. ADVANCE.

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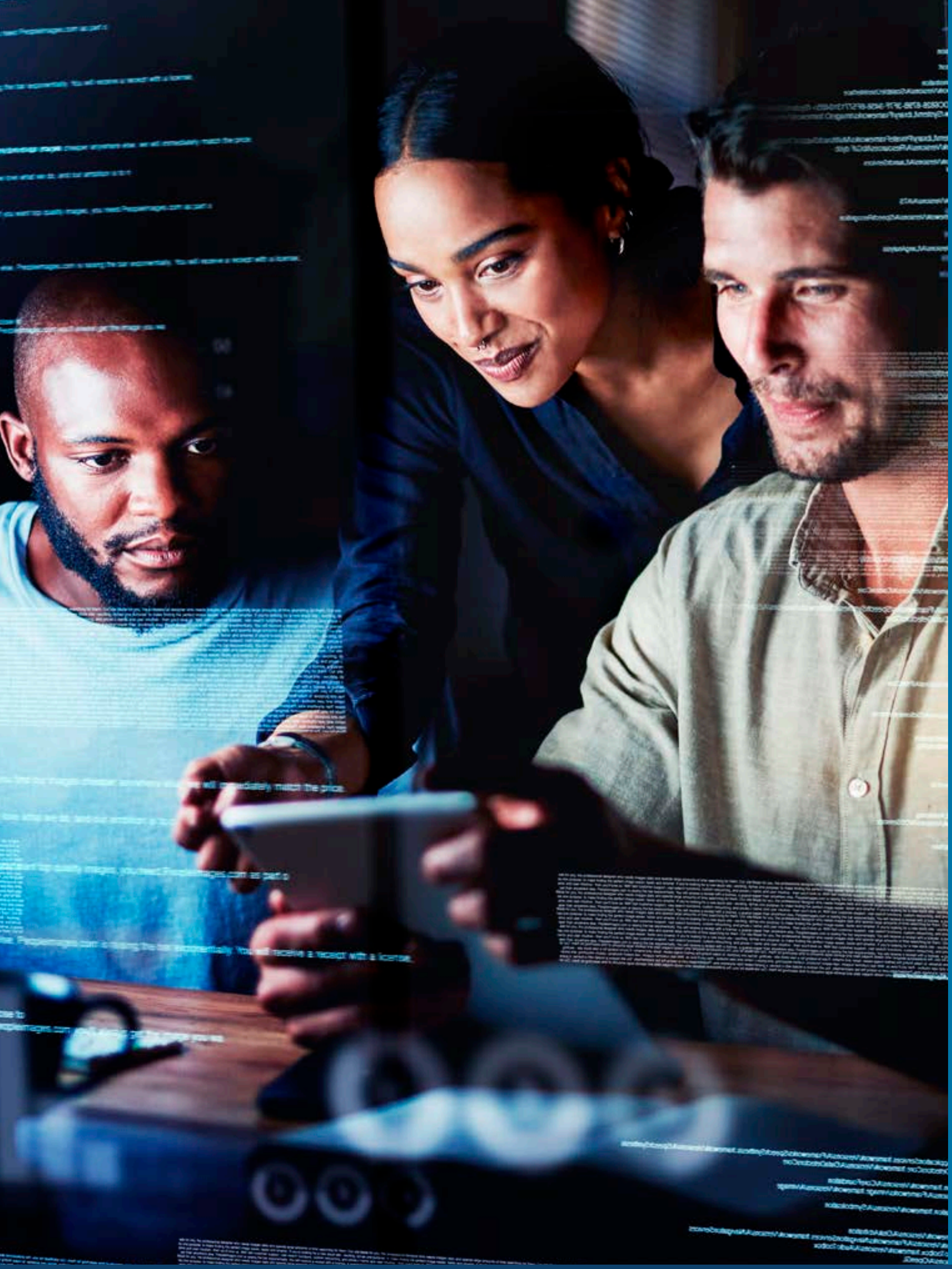


PURPOSE

To ensure consistent, high-quality reporting and accurate reporting, this policy outlines the standards and requirements for Subject Matter Experts (SMEs) providing Technical Assistance (TA) under Faces & Voices of Recovery's contracts.

SCOPE

This policy applies to all SMEs submitting reports and invoices for technical assistance rendered under Faces & Voices of Recovery's various contracts and agreements.

SUBJECT MATTER EXPERTS (SMES)

SMEs deliver technical assistance services and may be internal Faces & Voices of Recovery staff or Adjunct Faculty. Contingent on contract language, SMEs may be identified in the following manners:

- Experienced peer professionals
- Faces & Voices of Recovery Staff
- Recovery Consultant
- Adjunct Faculty
- Subject matter experts (SMEs)

INTRODUCTION

We offer two main types of services, Strategic Organizational Development Technical Assistance and Concentrated Technical Assistance.

STRATEGIC ORGANIZATIONAL DEVELOPMENT TECHNICAL ASSISTANCE

This service pairs an experienced peer professional with Recovery Community Organizations (RCOs), community groups, and other recovery-centered organizations at various stages of development. It aims to build capacity for organizations through individualized consultation and tools for planning, success, and growth. The process involves:

a. Initial assessment
b. Pairing with AF/consultant
c. Creation of a TA plan
d. Phased approach from concept to operations to sustainability
e. Recurring evaluation of outcomes
f. A series of participatory sessions guided by a work plan

CONCENTRATED TECHNICAL ASSISTANCE

This service is typically a specific, one-time request submitted via contract. It usually involves a prescribed set of hours to accomplish a specific project.

WORK PLAN REQUIREMENTS

A Technical Assistance work plan is a structured document that outlines the objectives, goals, tasks, timelines, and deliverables for a TA engagement. It serves as a roadmap for the consultant (Recovery Consultant/Adjunct Faculty) and the recipient to guide the TA process and ensure alignment with the project's overall goals.

STRATEGIC ORGANIZATIONAL DEVELOPMENT TECHNICAL ASSISTANCE

- A work plan MUST be created before beginning the engagement.
- The work plan may be a) Outlined by Faces & Voices of Recovery (Faces & Voices of Recovery) staff, or b) Developed by the Recovery Consultant/Adjunct Faculty, depending on contract specifications.

CONCENTRATED TECHNICAL ASSISTANCE

- A work plan may not always be necessary, depending on the request.
- Some requests may simply be referral or resource based.
- When required, the work plan should be agreed upon by both the SME and Faces & Voices of Recovery.

WORK PLAN EXAMPLE

TA Work Plan
Work Plan

Related **Details**

Technical Assistance Request

Requester Name and Contact Information

Deliverable Name

Number of hours

Anticipated Timeline

Type of TA

Consultant

Details

Implementation Plan
To be implemented via a series of TA zoom calls over the next months up to September.

Summary of Request/Rationale

Goals and Learning Objectives
Outreach Strategies
More robust fundraising plan
Organizational Sustainability

Evaluation Plan

Expected Outcomes
Expected Outcomes Could Include:

1. Possible Outreach Strategies:
Increased community engagement
Enhanced visibility
Improved communication channels
Expanded network
Data-driven approach for outreach evaluation

2. More Robust Fundraising Plan:
Diversified funding sources
Strategic fundraising plan
Donor cultivation strategies
Capacity building for fundraising skills
Evaluation for continuous improvement

3. Organizational Sustainability:
Financial stability strategies
Board development for effective governance
Program evaluation for impact assessment
Succession planning for leadership continuity
Risk management strategies

Materials Needed
RCO toolkit

REPORTING REQUIREMENTS

Purpose

Reports generated after a completed TA session will be shared with the contract holder and the TA recipient. The report should provide details to support transparency, accountability, and continued collaboration between all parties.

- Reporting helps to ensure Faces & Voices of Recovery has necessary information for financial auditing and high-level reporting needed for compliance.
- Reporting tells the story of the relationship and progress made through technical assistance services.
- Reporting provides a mechanism for outlining the next steps.
- Accurate and timely reporting ensures consultants receive payment for services rendered.

Submission and Format

- Submit reports within 5 business days of a completed TA session through the designated online portal in line with Faces & Voices of Recovery best practices to report on weekly activities.
- Upon assignment, Faces & Voices of Recovery provides a reporting link for the completion of reporting on rendered services.
- Use the provided submission link to ensure all fields are properly filled out.
- Confirm the report via the automated email sent on the following Tuesday; once confirmed, it will be queued for payment.
- Following confirmation, Recovery Consultant/Adjunct Faculty receives a copy of what was submitted.

Content and Structure

BASIC INFORMATION

- Organization/TA Requestor's Name
- Meeting/Session Number
- Type of Service (Organizational TA or Individual TA)

EXECUTIVE SUMMARY

- Brief overview of work completed, key outcomes, and achievements

REPORT (ALIGNED WITH THE WORK PLAN)

Objectives Addressed

- List the specific objectives that were the focus of the TA session, aligned with the work plan.

Activities Undertaken

- Provide a summary of the key activities completed during this reporting period.

Progress Made and Outcomes Achieved

- Describe the progress toward the objectives and any measurable outcomes.

Action Steps and Responsible Parties

- Outline any action steps that need to be taken before the next meeting, including specific tasks, deadlines, and the individuals or teams responsible for completing them.

Alignment with Overall TA Goals

- Explain how the activities and progress are in line with the larger TA objectives.

Challenges Encountered and Solutions Proposed

- Highlight any challenges that arose, along with the proposed or implemented solutions.

NEXT STEPS OR RECOMMENDATIONS

- Detail the steps or recommendations necessary to finalize and close out the TA, ensuring any remaining objectives are met.

WORK PLAN ALIGNMENT

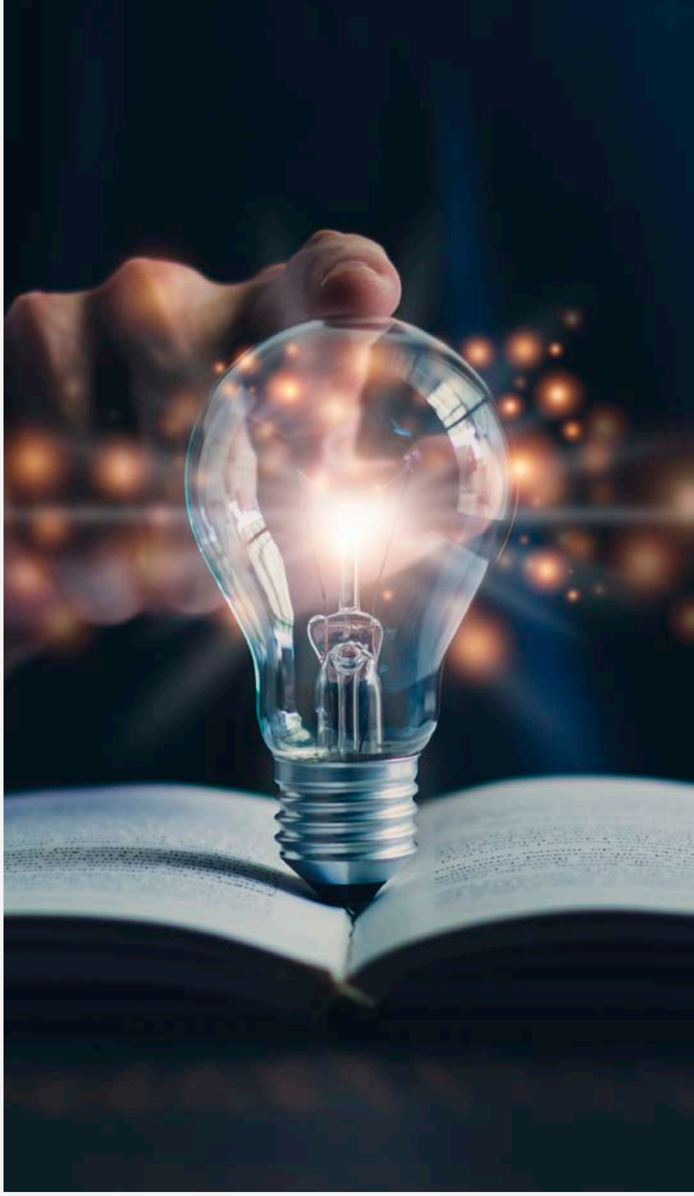
- Explain how the completed work aligns with the established work plan.
- Justify any deviations or modifications.

METRICS AND OUTCOMES

- Include any relevant data to demonstrate progress made.
- Compare actual outcomes to expected outcomes.

ATTACHMENTS

- Include supporting documents as necessary (e.g., data sheets, meeting notes, worksheets, workbooks, resources, and supplied links).



Clarity and Detail

- Reporting should be clear, detailed, and professional. Keep in mind that the requester will likely see the report, so ensure the language is respectful and appropriate. Avoid language you would not want disseminated broadly.
- Avoid vague statements and provide sufficient detail to substantiate the work completed.
- Use headings, bullet points, and other formatting tools to enhance readability and organization.

Quality Standards

- Ensure completeness, coherence, and relevance of information.
- Maintain professional tone, proper grammar, and clear formatting.

Review Process

- Reports will be reviewed within 10 business days of submission.
- Feedback will be provided if the report does not meet reporting standards.
- Faces & Voices of Recovery staff will review the report and provide any feedback. SMEs have 3 business days to revise and resubmit the report upon receiving feedback.

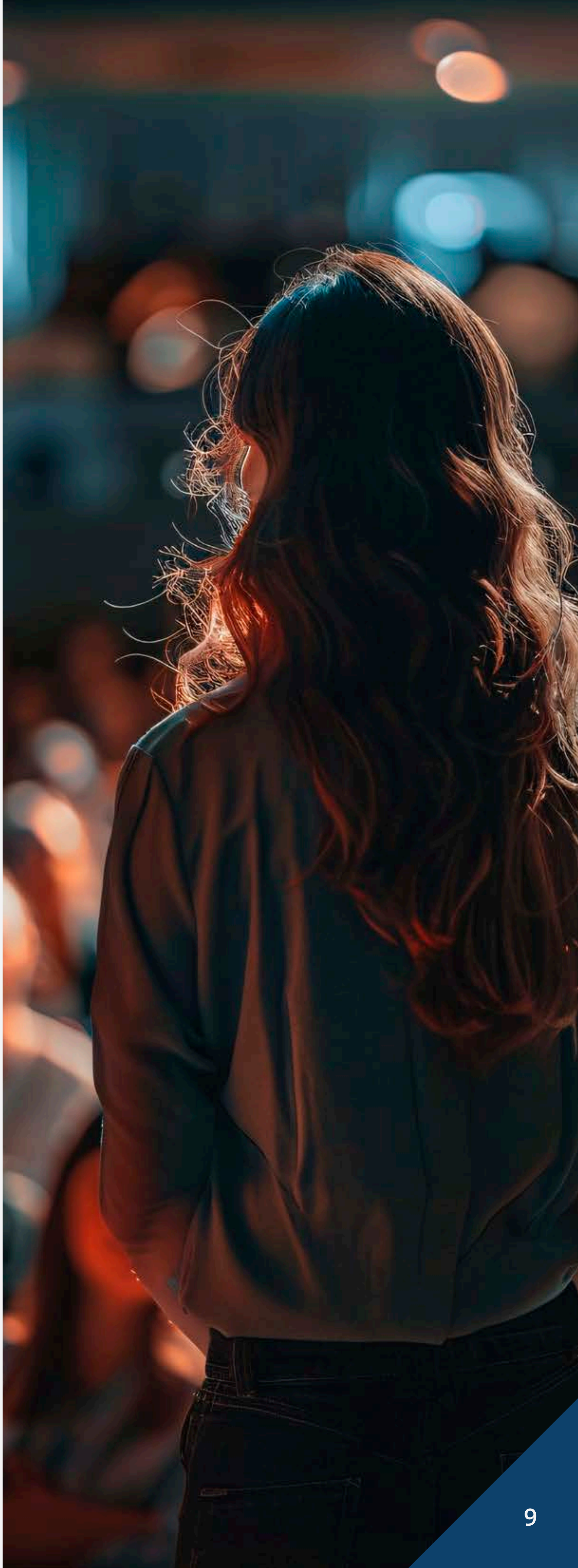
Billing Requirements

ACCURACY

- Ensure that all billed hours and expenses accurately reflect the work performed.
- Use detailed descriptions and itemize charges as necessary.
- The report link includes a place to add meeting minutes and admin minutes. Please be as accurate as possible with those times.
- Admin minutes are defined as time spent outside a meeting working on the work plan or reporting.

CONSISTENCY WITH WORK PLAN

- Charges should align with the tasks and deliverables outlined in the work plan.
- Any discrepancies must be justified and documented due to contract requirements.



Submission Process

FORMAT AND SUBMISSION

- Submit reports and invoices using Faces & Voices of Recovery's designated billing/invoicing system.
- Coordinators provide unique links at assignment, along with suggested naming convention.
- Follow the provided templates and guidelines for submission.

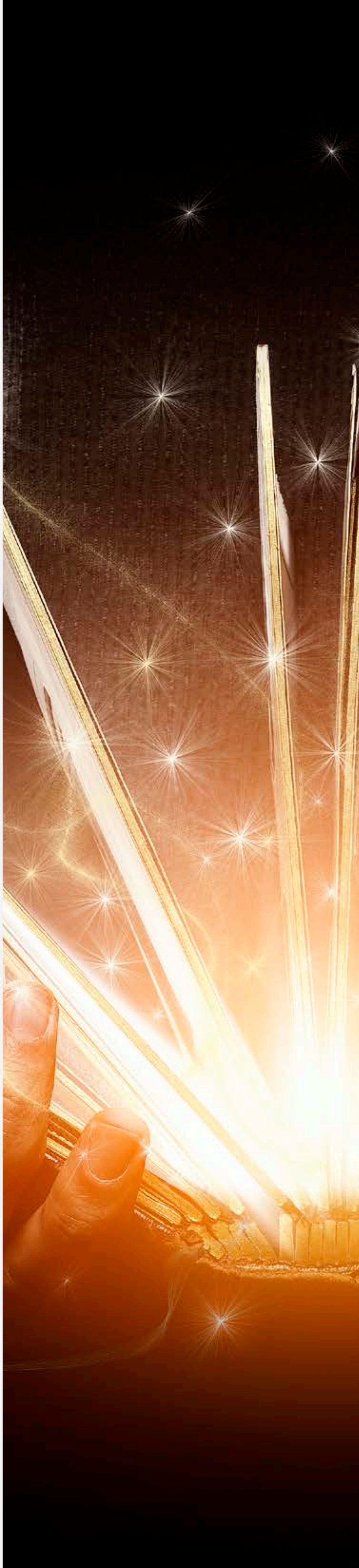
PROJECT NAME: NAMING CONVENTION

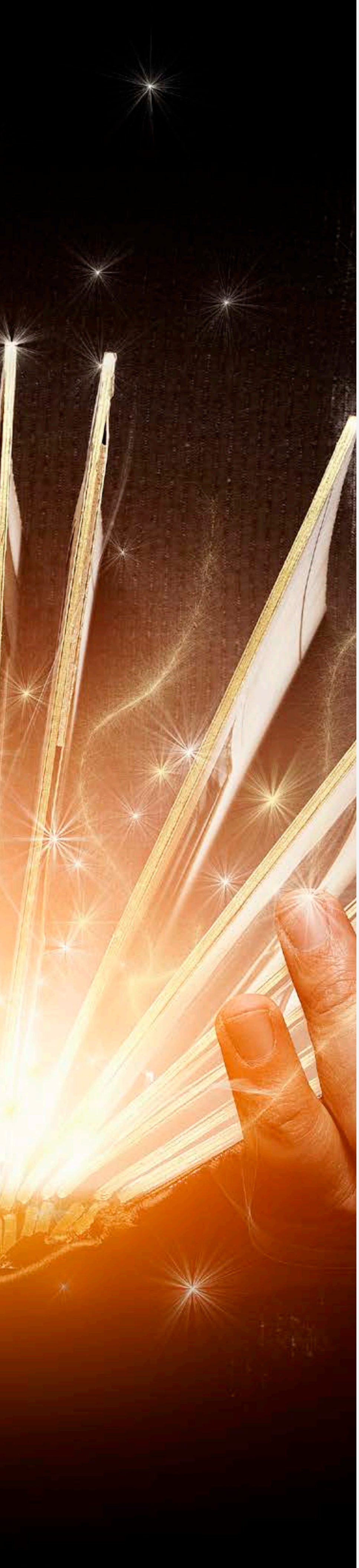
- **Strategic Organizational Development Technical Assistance:** Name of the contract, name of the organization requesting TA. Example: State of Indiana TTA 24-25 180 RCO.
- **Concentrated Technical Assistance:** Name of the contract, name of the requesting org/individual. Example: NHRTAC Cook County Health Department
- This information will be provided to the SME once they accept the TA assignment.


Project Name (REQUIRED)

Description Naming Convention

- Use Meeting 1, Meeting 2, Meeting 3, etc.
- Not every reporting box must be filled out, but please check the applicable box: meeting, work plan, or recommendation.
- SMEs can check all reporting boxes to use a single or multiple combination of the three.





Meeting

Please provide your meeting details below. Do not include any time to schedule or follow-up after this meeting.

Meeting Name (REQUIRED)

0 of 255 max characters

Start Date (REQUIRED)

mm/dd/yyyy

Start Time (REQUIRED)

HH : MM AM

Duration (Minutes) (REQUIRED)

*Please enter a number from **15** to **90**.*

Number of Attendees (REQUIRED)

Additional Meeting Minutes

*Please enter a number from **15** to **90**.*

Please include the additional minutes used to schedule, communicate resources or follow-up here. These will be added as administrative minutes for this meeting.

REVIEW AND APPROVAL

- Submitted reporting/invoicing will be reviewed for adherence with these guidelines.
- Incomplete submissions may be returned for revision.
- Once a report is submitted, it queues up for payment in our system. Every Tuesday, those invoices are processed and sent to Recovery Consultant/Adjunct Faculty for final approval.

Congratulations we have an invoice created for you! You may wait to have more line items created for work you are submitting or you can approve/submit changes to receive payment now using the following link: Click Here

- Review the email to check for accuracy of submissions. Once approved, it then queues for next steps in the payment process.
- Faces & Voices of Recovery strives to pay out regularly and quickly, with the understanding that we have a net 30 policy.

COMMUNICATION

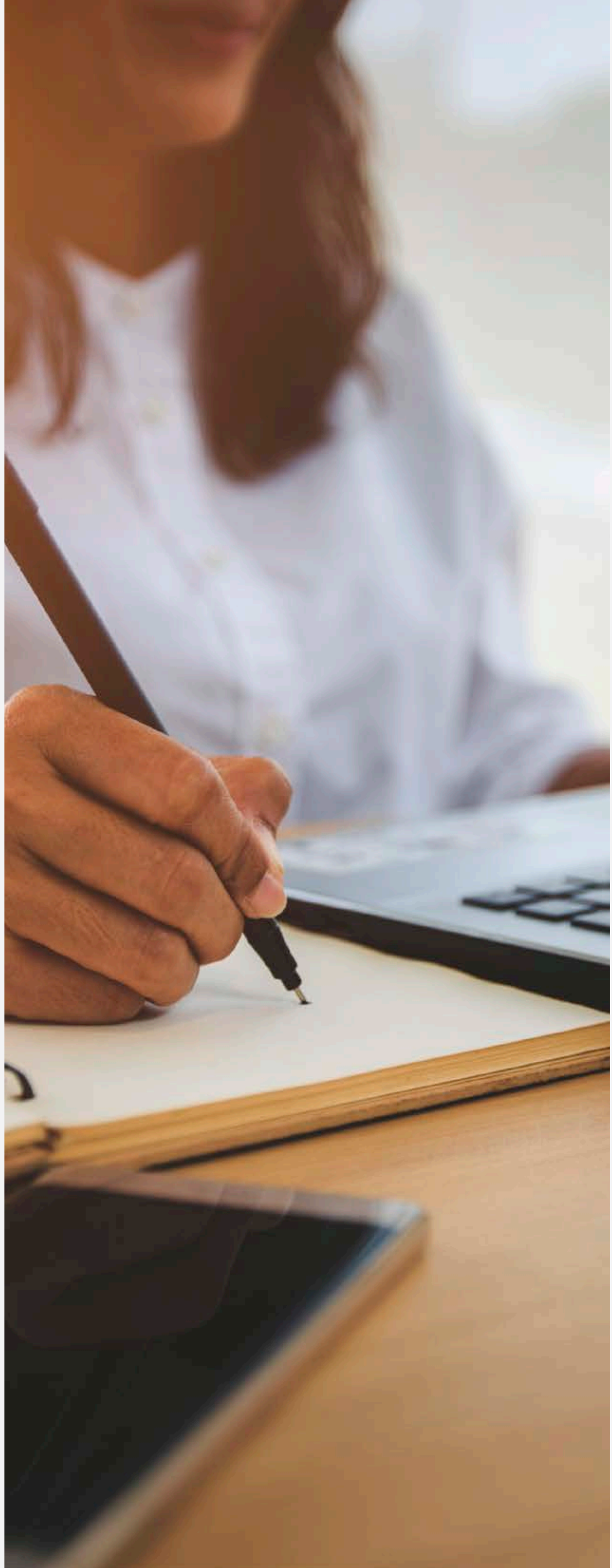
- For any questions or clarifications regarding this policy, or if issues arise during reporting or billing, SMEs should contact the project lead or the TA program manager.

Relationship to Payment

- Invoices will not be processed without an accompanying report that meets these standards.

Policy Implementation

- This policy takes effect on December 1, 2024.
- All SMEs will receive training on these reporting requirements before the implementation date.
- This policy will be reviewed annually and updated as necessary to ensure it remains relevant and effective.



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GET IN TOUCH

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