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RCSP GRANTEE MEETING AND WORK SESSIONS

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RCSP Grantee Meeting And Work Sessions

■ MEETING OVERVIEW

INTRODUCTION

The Recovery Community Support Program (RCSP) *Grantee Meeting and Work Sessions* was sponsored by the Center for Substance Abuse Treatment (CSAT) in the Substance Abuse and Mental Health Services Administration (SAMHSA).

At the time of the meeting, the 19 RCSP grantees were 15 months into their three-year grant program. As in all RCSP grantee meetings, important community-building and community-learning components were included. The emphasis of the *Grantee Meeting and Work Sessions*, however, was on three substantive areas identified by the grantees and CSAT as needing focused attention: building advocacy readiness, sustaining the recovery community organization after Federal funding ends, and developing project case studies that convey lessons learned.

■ MEETING GOALS

The goals for the meeting were designed in a collaborative process that included telephone and e-mail communications with the grantees, analysis of quarterly reports and technical assistance requests, and feedback from technical assistance providers and others who had visited the grantees on-site. The result of this planning was a meeting designed to help participants:

- Clarify their understanding of the differences between lobbying and advocacy and review various systems advocacy and public education activities that support RCSP goals.
- Refine plans for accomplishing their projects' advocacy and public education goals.
- Explore key concepts, strategies, and skills for developing a plan to sustain their recovery community organizing effort after Federal funds end and take initial steps to develop a sustainability plan.
- Review requirements for the required case study and discuss technical assistance resources available for completing the case study.
- Share lessons learned and resources with other RCSP project leaders and with CSAT staff.

■ AGENDA AND FOCAL POINTS OF THE MEETING

As detailed in the Agenda, presented as Appendix I, the *Grantee Meeting and Work Sessions* focused on three substantive areas: advocacy, sustainability, and the RCSP case studies. These are the subjects of the following Meeting Reports:

MEETING REPORT NO. 1 summarizes a series of keynotes, plenaries, panels, training sessions, and community dialogues in which participants explored conceptual and other challenges related to **advocacy**.

These sessions included: exploration of the concept of “advocacy readiness” in a recovery community context, as well as in the context of other public health advocacy constituencies; training on the difference between advocacy and lobbying; and, at their request, a discussion among the grantees about the timeliness of a national recovery community movement or organization.

MEETING REPORT NO. 2 summarizes the workshop and group discussion on **sustaining the effort** after Federal funding ends.

These sessions included: ten principles of sustainability; funding basics (the big picture); learning how to transform supporters into champion stakeholders; building a Case for Support; marketing the organization and working with the media; collaboration; resource development; and making the “Ask.”

MEETING REPORT NO. 3 reviews the training on **RCSP case studies**. This training built upon discussions at the *Grantee Meeting and Training Institutes* (June 28 - July 1, 1999), the Case Study Guidelines developed for the RCSP, and a Case Study assignment prepared by each grantee.

In addition to the focus on these substantive areas, a number of other activities were conducted during the *Grantee Meeting and Work Sessions*. For example:

- Grantees had the opportunity to meet with CSAT and RCSP technical assistance (TA) staff as well as other technical assistance providers for “TA on the Spot.” Some used this opportunity to discuss particular issues of concern to them, and others used it as a forum for exploring technical assistance they anticipated needing in the future.
- Grantees participated in one of two work sessions designed to elicit and incorporate their input into future RCSP planning.
 - The first session focused on a review of RCSP written products to date (including the TA Tips and Listserv, a draft of Highlights of the June 28 - July 1, 1999 *Grantee Meeting and Training Institutes*, and the draft TA Brief on advocacy as distinguished from lobbying), as well as materials prepared by others, including the Alliance Project. Preliminary discussions were held about future technical assistance documents that would be useful to grantees and to the field.
 - Participants in the second working session helped to shape a conference agenda, procedures for scholarships, and a call for presentations for the Spring 2000 RCSP Conference.

MEETING REPORT NO. 1

Day One: Advocacy

■ GRANTEE MEETING AND WORK SESSIONS

Day One of the Recovery Community Support Program (RCSP) *Grantee Meeting and Work Sessions* consisted of a series of plenary presentations and panels, opportunities for team work, and a community dialogue, all focusing on aspects of the advocacy “action work” of RCSP recovery community organizations.

These events included:

- A keynote address, *From Personal Recovery to Community Activism*, by Henry Lozano, President and CEO of Californians for Drug Free Youth.
- An Issues Panel focusing on a range of issues and approaches to advocating for better addiction treatment systems. The Issues Panel was moderated by Barry Blandford, RCSP Project Officer, and featured Sarah Kayson, Director of Public Policy, National Council on Alcoholism and Drug Dependence (NCADD); Neill Miner, Operations Director, The New England Institute of Addiction Studies; and Paul Samuels, President, The Legal Action Center.
- A Grantee Panel describing effective advocacy approaches used by RCSP projects. The Grantee Panel was moderated by Catherine Nugent, RCSP Project Officer, and featured Coco Gumacal (Recovery Community Support Program of the California Association of Alcohol

and Drug Program Executives), Mary Kronquist (Project Vox of NCADD of Michigan), Heather Lyons (Recovery Association Project of Central City Concern), and Bob Savage (Connecticut Community for Addiction Recovery).

- A training by June Gertig, RCSP Technical Assistance Project, that differentiated acceptable advocacy from the lobbying that is restricted by both tax rules and rules specifically applicable to Federal grantees.
- A plenary presentation, *A Case Study of Effective Organizing with the HIV/AIDS Consumer Constituency (Understanding Advocacy Readiness in the HIV/AIDS Community)*, by Patricia Hawkins, Associate Executive Director, Whitman-Walker Clinic.
- An opportunity for grantee team work facilitated by Elizabeth Burden of Burden & Burden Consultancy, revisiting project advocacy goals and objectives and exploring the range of activities necessary to accomplish them.
- A community discussion, facilitated by Cathy Nugent and Elizabeth Burden, focusing on aspects of advocacy readiness in the recovery community.

From these events, two central concepts emerged:

- **Advocacy, even advocacy focusing on changing public policy, is a broad construct encompassing much more than attempts to influence specific legislation.** The range and scope of advocacy activities are explored in Section 1 below.
- **Individuals and organizations may be in very different places with respect to their readiness to engage in advocacy activities. Promoting advocacy readiness is part of the work of RCSP grantees.** Advocacy readiness is explored in Section 2 below.

Day One of the *Grantee Meeting and Work Sessions* ended with a Community Dialogue, requested by the grantees, entitled *First Thoughts on "Taking It National."* This dialogue was moderated by Rick Sampson, Director, CSAT Division of State and Community Assistance, and is detailed in Section 3 below.

■ SCOPE OF ADVOCACY

A variety of formats were used to convey the message that effective advocacy, even within the context of seeking changes to public policy, encompasses much more than attempts to influence specific legislation.

The Issues Panelists (Kayson, Miner, and Samuels), for example, shared their experiences in public policy advocacy in a wide variety of contexts where recovery community input could advance objectives important to the community. They made a number of points, including:

- Legislators are not the only people who set public policy affecting treatment. Equally important are the people who design and administer treatment systems.
- Opening minds is often a prerequisite of effective public policy advocacy. For example, policymakers are often mired in a “once an addict, always an addict” sense of hopelessness, and until that changes, they will continue to be skeptical of the data and of solutions offered by professionals.
- The recovery community’s interest in public policy includes treatment, but is also much broader. All across the country, issues of fundamental importance to the recovery community are being raised, issues concerning the basic civil rights of people in treatment or recovery, including the ability to obtain the necessities of life (e.g., employment, housing, insurance, government benefits) and basic respect from society and their fellow Americans. An example is the recent “Second Chance” initiative of the former Mayor of New York, Ed Koch, and the Reverend Al Sharpton that would seal the records of ex-offenders who have achieved a sustained recovery. Such efforts have a far greater chance of succeeding if the recovery community educates itself on the issues and becomes actively involved while consensus-building and community buy-in are occurring.

Meeting participants also worked as project teams to identify and explore the range of activities that may need to precede any effort to achieve a specific legislative or public policy objective, such as:

- Raising awareness and increasing knowledge;
- Building member skills;
- Documenting needs and evaluating services;

“Many of the things that recovering people tell us are most important to them—such as being able to navigate between levels of care or between different treatment modalities, or the availability of supports for early recovery—will be determined by decisions made at the level of the Single State Agency. There is a great bang for the advocacy buck in being at the table where those decisions are made.”

Neill Miner

“I can’t tell you how often I have watched a panel of legislators listen to experts testify on ‘treatment works’ data, only to have a legislator say ‘My nephew had treatment and it sure didn’t help him.’ Someone needs to take that legislator back to his district and introduce him to his constituents whose lives are back on track thanks to treatment.”

Sarah Kayson

“Many of the recovery community’s issues are really issues of discrimination and social injustice. It is often social movements, not narrow lobbying, that create change of this sort. The recovery community has the capacity to become an important part of a social movement if they see that the discrimination and injustice are happening to them and people like them, that it isn’t fair, and that they have the power to change it.”

Paul Samuels

“The rules are clear: as Federal grantees, you cannot spend one thin dime of the Government’s money on lobbying. The good news is that you and your members can serve as informed, empowered, and effective advocates for recovery and as agents of systems change without violating the prohibition against lobbying with Federal funds. The bad news is that you simply must study and understand some rather complicated rules to be able to tell the difference.”

June Gertig

- Witnessing to the barriers that hinder or prevent access to existing services and recovery supports; and
- Influencing organizational practices and changing systems.

Participants were asked to hold the following thought for consideration in the Day Two sessions on sustainability: It can be difficult to get funding for activities that are characterized as legislative advocacy, and easier to get funds for many activities that are the components of effective advocacy efforts.

The training on the difference between permissible advocacy and prohibited lobbying, which is restricted by Federal tax rules and by rules specifically applicable to Federal grantees, also explored some of the dimensions of advocacy. This technical training was targeted to the RCSP grantee leaders who are responsible for legal compliance. The training was framed around a draft Technical Assistance (TA) Brief, as subsequently modified to incorporate the comments of grantees and others.

Finally, the Grantee Panel described project activities that clearly are focused on changing public policy but that do not constitute lobbying (for reasons explained in the TA Brief). For example:

- The California Association of Alcohol and Drug Program Executives’ Recovery Community Support Project is sponsoring self-advocacy conferences that help treatment clients move from self-advocacy to public advocacy, providing both skills training and a forum to discuss their treatment and recovery concerns (but not specific pending legislation) with administrators and policymakers, including State legislators.
- Project Vox, of NCADD-Michigan, sponsors legislative breakfasts to acquaint State legislators with issues (not specific pending legislation) of concern to its members, during which people in recovery are asked to stand, demonstrating their numbers.
- Recovering IV drug users in the Recovery Association Project (RAP) in Portland, Oregon are working with elected County officials to develop County-funded treatment initiatives, including a peer-mentoring program to help bridge the waiting-list gap between detox and available treatment beds, and to promote better public health treatment protocols relating to hepatitis C.
- The Connecticut Community for Addiction Recovery (CCAR) has developed a Bill of Rights tailored to the needs of addiction clients and is advocating for its adoption, together with

related grievance procedures, by the Connecticut Single State Agency.

"Don't forget where we came from. Our roots are in thanksgiving. I am thankful to be here today. I am thankful to be alive, to be able to breathe, to see the sun. Others may come to this work with passion, but we are the ones who come to it with thanksgiving."

Henry Lozano

■ ADVOCACY READINESS

The theme of advocacy readiness first surfaced in the keynote address of Henry Lozano. In tracing his own journey from personal recovery to community activism, he noted that, in his experience, moving from a sense of personal struggle to a sense of community-wide struggle involves important cultural variables.

Culture, he said, has many elements, but fundamentally is about shared experiences and values. People in recovery will coalesce around a community-wide struggle for recovery, he said, based on their sense of what is common, as opposed to different, in their personal experiences of addiction and recovery. People must have the time and space to discover the residual common values that derive from their individual journeys.

In her presentation on the HIV/AIDS consumer movement, Dr. Patricia Hawkins pointed out that in 1982-83, when the movement got started, there was no test for AIDS and the average life expectancy after diagnosis was four to six months. Once a person learned he or she had the disease, dealing with dying became the central preoccupation of the person and his or her loved ones.

"For HIV/AIDS consumers, it was a case of 'build it and they will come.' First came immediate support needs. Advocacy came next; then finally, an empowered consumer movement. The movement grew out of the advocacy, not the other way around."

Patricia Hawkins

In these circumstances, waiting for advocacy readiness on the part of consumers and families was a luxury no one could afford, and providers took the lead in building networks to deal with death and dying and, as they emerged, policy issues.

As a test was found that allowed for earlier diagnosis, and as life expectancies gradually increased, consumers coalesced around issues of importance to them. Dr. Hawkins pointed out that, in a crisis-driven movement, new issues keep emerging, and ongoing needs define and redefine the agenda. For the HIV/AIDS population, the first issue was quarantine; then came names reporting; and then a wide variety of discriminatory practices, ranging from housing to employment.

"For HIV/AIDS consumers and families, there was such a sense of urgency that issues of trust, while important, were in some sense secondary."

Patricia Hawkins

Next came the need to create images to put a human face on a disease everyone feared. A white heterosexual woman allowed her decline and death to be photographed. White heterosexual women were not the primary victims of this disease, and many, particularly in the gay and lesbian community, were anguished about this choice

"Time and again, we have found that legislators and other policymakers would use our internal struggles as an excuse to ignore us, so we have worked to find common ground and common messages. We have found that our most effective message, as it has always been, is the image of a person with the disease moving forward."

Patricia Hawkins

of image. The same issue arose later with Ryan White, when the image of a child was chosen although only one percent of HIV/AIDS victims were children. HIV/AIDS activists learned that the choice of stigma-reduction imagery not only requires finding images that will "sell" to the general public, but also involves ethical challenges to the affected communities.

Later, HIV/AIDS activists began to push for government funding that would, in effect, support a community-wide advocacy campaign to contain and treat the disease. This was not about programmatic needs. It was about funding an advocacy infrastructure. This created a new round of challenges because, once money is introduced into the mix, people begin to fight over it. The challenge of overcoming the inherent divisiveness created by money remains a central challenge to effective HIV/AIDS consumer advocacy.

Meeting participants began to synthesize the concepts and themes that had been offered on advocacy readiness. Participants identified a dynamic set of factors affecting advocacy readiness.

"Willingness to advocate for change presupposes that you believe that change is possible. People in the recovery community have, almost by definition, experienced change on the personal level, and in terms of their significant relationships. In this process they have developed self-advocacy skills. The challenge of advocacy readiness in the sense that we are talking about here is moving from self-advocacy in the personal domain, to advocacy in the broader community and political arena."

Catherine Nugent



TIP

Factors Affecting Advocacy Readiness

Factors that affect advocacy readiness may differ from person to person and community to community. They are:

- Culture (including one's culture of origin and the culture of recovery);
- Where a person or community is, developmentally, in terms of a personal or societal journey of recovery, including immediate recovery support needs;
- Recognition that there is a disparity between what exists and what could exist;
- A sense of urgency about eliminating the disparity;
- A sense of personal efficacy about contributing to the removal of the disparity;
- The strength of factors impeding advocacy readiness, such as stigma; and
- The strength of factors promoting advocacy readiness, such as a sense of "survivor's mission."

Meeting participants concluded that a recovery community organization can promote the advocacy readiness of its members by focusing on these factors in constructive ways. Communications with members can be designed, for example, to increase understanding of the discrepancy between what is and what could be, and to promote a sense of self-efficacy in contributing to the solution. Still more important, the process of determining the agenda, including priorities and strategies, is critical to a sense of ownership and a readiness to advocate for it. From this perspective, a recovery community organization striving for long-term sustainability may need to invest more in the process of developing members' ownership of the agenda than in achieving the immediate advocacy goals.

"We shouldn't be surprised or discouraged when people who have survived trauma and loss don't automatically leap to the barricades. Developmental work, which needs to be consistent with where people are in the healing process, is part of the work of a recovery community organization. We have to meet people where they are, addressing their current issues and needs.... It is also possible that as people progress in their recovery, healing, growth, and transformation, they may find they no longer identify so strongly with their addiction/recovery history, that they embrace new and emerging roles in their lives. At that point, perhaps the role they want to play in a recovery advocacy organization will be different from the work of those still close to their addiction history. In other words, there may be a developmental continuum that has to do with how close people are to their addiction, treatment, and recovery experience, and it may be important to craft messages and to provide meaningful opportunities for engagement that are relevant to people all along the continuum."

Catherine Nugent

■ A NATIONAL MOVEMENT/ORGANIZATION?

At the request of the grantees, time was set aside for a community dialogue about the timeliness of a recovery community national movement or organization. Rick Sampson, Director of CSAT's Department of State and Community Assistance, opened the session by asking a number of questions to "prime the pump" for the discussion.

- Are you talking about a mega-organization that everyone is subsumed under?
- If all politics is local, what do you gain from it? Do you lose touch with your grassroots if you look to neighbors in Washington as opposed to the member down the street?
- Are there existing national organizations in place with which you can hook up? If you hook up with an existing national organization, do you surrender autonomy? Whose agenda do you advance? Are you strong enough to influence an existing national organization's agenda?
- Each of your groups has a unique identity. Do you lose any of that if you become part of a national organization? Do you lose diversity of membership, thinking, strategy?
- Do you get a larger voice with a national organization? Does joining a national organization help you sustain what you have created?
- What is the role of the Federal Government?

In the dialogue that followed, diverse viewpoints were expressed. They are presented at the end of Meeting Report No. 1.

The moderator synthesized participants' comments as follows:

- “Let’s dream the dream” is a powerful message.
- Is this dream about *allowing* something to happen, or about *making* something happen? Meeting participants seem to be unsure.
- There is also some caution and fear. The views of meeting participants ranged from “Maybe we aren’t quite ready” to “We’re impatient and we want to get there tomorrow.” There seems to be a comfort level with knowing that grantee organizations may be in different places developmentally and that it is appropriate okay to disagree.
- Whatever happens, RCSP grantees’ efforts should reflect by recovery values that grantees have emphasized from the beginning—integrity, honesty, and insisting upon a table big enough for all. This emphasis on a big table is a special quality of the RCSP—elements that could have caused conflict have not caused it here. Instead, there is a focus on what we have in common.

The moderator then asked the participants what they wanted CSAT to do. It is not CSAT’s role to create a national organization, he said, but CSAT, through the RCSP, has the capacity to help the recovery community determine where it wants to go.

The participants suggested that CSAT help facilitate the decision-making process by blocking out time at subsequent grantee meetings to allow the dialogue to continue and by providing expertise from other national grassroots health movements.

A number of participants also mentioned the importance of developing dialogue within each grantee recovery community organization, so that conversation among grantees attending a conference is informed by discussion at home and reflects grassroots sentiment, not just the views of grantee leadership. As one participant put it, “We really need to trust the process. Let’s do what we need to do today, and then we’ll see what unfolds.”

National Movement/Organization Participant Comments

“Is there an established cause for us to mobilize around? Or are we searching for a common cause? In my State, if there were such a cause, it would be that treatment is driven by providers. We would want a consumer-driven field. A real recovery movement would be about changing treatment. Are all of us about the same thing?”

“I am fearful about engaging in advocacy on a national level because we are so young. Our issues are very local. We don’t even quite see this as being about legislation. Our issue is to get more treatment to people who need it.”

“Looking for a cause doesn’t make sense; there are too many causes. We are very young.”

“There is such a dearth of voices for the recovery community. We have lost so much over the last ten years because we don’t have a voice. If we wait until we are organized and completely ready, I don’t think we will ever be able to do this. We’ve lost this and we’ve lost that—because recovering people aren’t up there speaking.”

“Let’s take first things first. We have heard from NCADD and from the Legal Action Center that they need us to help them do their work. Just doing that will consume all our energy. Building the grassroots recovery community constituency is where our energy should be focused now. To put a lot of effort into a national organization doesn’t make sense.”

“We are doing national advocacy already. Parity is a big, big issue. It’s right here in front of us.”

“Maybe we need to find some boundaries in what we are doing. Maybe we should wait until a need arises for a national organization, and let that decision be driven from the bottom up. Right now our recovery community organization is focused on simply figuring out who we are and what we are doing, and communicating that to others, including 12-Step recovery programs.”

“I have been an addict. I am also a counselor and I have grown with the field. I am very involved with the National Association of Alcoholism and Drug Abuse Counselors (NAADAC). They want to hear from the recovery community to

help influence public policy about treatment. If we go slowly, one day and step at a time, we can do it.”

“I am in recovery but I am not a counselor. I have been learning a lot since I got involved in this project and I know that, before I make decisions, I have to be educated. I would like to learn more about past movements, and how they have come and gone. I am reading *Slaying the Dragon* [by William White] for example. My recovery community organization decided to affiliate with NCADD not because it is fabulous or doesn't have problems, but because we think they can help us with sustainability when the grant ends.”

“I like the idea of a national organization. It will help us at the local level to be able to say that we are already getting organized at the top.”

“I can't imagine this not being national. As the leader of an NCADD affiliate, the recovery community organizing effort is bringing me an additional core of people I can gain sustenance from. We haven't had that in our communities. We are gaining a whole other troop of people. What CSAT has done by bringing us all together is to give us a taste of working together. I want this to keep happening when the grants run out because it's the only way we can have one voice.”

“I think CSAT was really smart when it picked the 19 grantees, because it got people who otherwise would have been overlooked. There are a lot of us doing hard work on the home front, working with people who don't have a voice and trying to pull them up and giving them skills to come up to the table. I don't want to do this work without giving them a vision of a national movement. I also don't want to give them a vision of a national movement that doesn't have a place for them. When I come here, I have energy. When I go back home, I no longer feel that I'm working alone.”

“The elders tell us that things grow when you dream a dream. Things grow in cycles: building your roots, making good choices, achieving influence, then mastery, and then teaching the young ones. I like coming to these meetings—something good is happening here. This thing has a spirit about it unlike anywhere else I go. You can't just plant corn any time you want. You can't bring people together in a good way anytime you want, either. Just since I've been here, I know you are going to help me with something I didn't know I could do a year ago. That's kind of how it will go. The more we give and serve each other, the better off we will be.”

“From a recovery community inside the Beltway, I can tell you there is national interest in what we are doing. Just yesterday, we got a call asking if we had a chapter in California. I can't conceive of us not being national.”

“I don't want to be a naysayer, but I don't think we should forget we are working with a lot of stigma here, including from within our recovery ranks. We are finding it a challenge to try to assure AA and NA members, for example, that we are not here to replace them or to tread on something that works. They ask pointed questions like 'What are you doing with the money?' Are we ready to go national until we have worked out these issues?”

“The reason I got into this personally is that I have the person who is still suffering in my heart. AA and NA oldtimers want to know if that is true about our recovery community organization, and whether we will do what we do with integrity, honesty, and patience. Locally, we have been showing these qualities, and oldtimers are starting to show an interest and join. On a national level, it will be the same questions: Do we have the person who is still suffering in our hearts, and are we building with integrity, honesty, and patience?”

“I look at this as a question of opportunity and resources. The RCSP has given us the opportunity, but if we wait too long, we won't have resources. It's a question of timing and sustainability.”

“I think there is going to be a national movement around recovery, with or without us. If we don't do this, someone will do it for us. Shouldn't we have input, even be driving the train? I see us as a unified voice, a powerful voice, one that includes diversity but that is not a voice from the past. Let's build on our own strengths and weaknesses, and even our failures—what have we got to lose? I believe in one day at a time, but no one said we couldn't plan for the future. Let's have vision, let's think big. We are all dealing with external and internal oppression. They don't like us. They don't understand us. So what? Let's find a big train and let's get it going. It has to include us all. It has to be honest. It has to have integrity. It has to have patience. Stop talking about *whether*—let's just talk about *how* we are going to do it.”

“I've been around for a long time and seen a lot of national organizations. Some are gone and some are still around. All have represented the field well in some ways, and all have also created some problems. Collectively, we have accomplished a credible job of convincing people that addiction is a big problem. We've not done the same effective job in convincing people that what we do makes a difference. Recovery is not visible, and until it becomes visible at a critical level, we are not going to see real

change. By a critical level, I mean that the community has to begin to think of recovering people as neighbors, not just Betty Ford and Ann Richards. I don't know how we accomplish this. Some of it is one-on-one—chipping away at prejudice and discrimination, one person at a time. But we also need a critical mass of recovery visible on all levels, including national.”

“ This discussion is scaring me because issues of power and diversity are involved. CSAT and the RCSP have created an environment here that goes beyond sharing—this is a trusting place. We are organizing on a very local level, where we are also trying to create a trusting place. When we talk about national and regional levels, we will need to figure out how to keep what we are really all about close to our hearts.”

“ When I first got into recovery, I was challenged to get a power greater than myself, and I was challenged to go find it. I had no clue how to do it. I took on faith something I didn't know existed. My challenge to us today is this: How much faith do we have in what we are doing? How much faith do we have in the recovery community? Why are we in this? I am doing this work because someone was working in the field when I first came in. If we believe in what we're doing, then why not? ”

Day Two: Sustaining the Effort After Federal Funding

■ GRANTEE MEETING AND WORK SESSIONS

Participants may have come to this session thinking that sustainability referred to obtaining funds to continue the recovery community organization (RCO) after CSAT funding ends. They found, instead, that sustainability is much broader than simply securing continuing financial footing, and that almost everything they do, in one way or another, supports the RCO's continuance and "life after CSAT."

Many activities may be involved in sustaining an organization, from recruiting new members to getting a hefty foundation grant. It is easy for leaders and members of an RCO to think of these tasks separately, placing each in its own "box" in the individual and the collective mind. For example, there is the box for fundraising, another box for sustaining membership, another one for making media contacts, and yet another for tapping into community resources that can help support the RCO, through gifts of service or products.

All of these activities were put together in one big box called sustainability by co-facilitators Susan Hailman and Elizabeth Burden, in a day-long session on the topic. As the session progressed, the facilitators showed how the same skills are involved in raising funds from donor organizations, approaching

potential new members for recruitment, contacting the media to get coverage of an RCO event, or seeking the support of other community organizations in a joint advocacy campaign.

All of these seemingly diverse activities can be combined to build organizational permanence. But they all have at their core a series of fundamental steps that can be described as developing a story to achieve some goal, telling the story effectively, telling what you propose to do to respond to the issues in your story, finding the resources needed for the response, and following through by doing it.

During the day, grantee leaders were exposed to the processes involved in crafting the story and putting it in various packages, each designed for the audience they are approaching and the purposes they have in mind.

The day began with Susan asking participants to state what skills they wanted to learn to sustain their RCOs. Although most stated they desired skills related to raising funds, the RCO leaders in attendance also said they needed guidance and tips on:

- Keeping the RCO viable over time—survival;
- Keeping people interested in the organization;
- Increasing members' participation and the contributions of their skills and talents;
- Marketing the program to ensure sustainability;
- “Packaging and selling” the RCO;
- Finding strategies to use in approaching foundations, corporations, and members—for contributions to support fiscally the RCO; and
- Building stronger alliances.

■ WHAT IS SUSTAINABILITY?

Susan noted, “If your organization has sustainability, it means you have a base of people to speak for your project when you are not there.” She suggested that there is “above-ground” and “below-ground” work to be done in any organization. The below-ground work consists of planning events and meetings, preparing materials, contacting people, and keeping records. This work is often done by volunteers—the members of the organization and its stakeholders.

Earning “buy-in” from newcomers to the organization, in the first place, means telling the story of the organization effectively in recruitment and engagement efforts. Once newcomers buy in to the story, and see that they can help add to it, they will want to take part in the

below-ground work. As they acquire skills, they can then contribute to the planning, shaping, and thinking of the organization. They become contributors to the process of sustaining the organization by helping to set goals and objectives, planning advocacy sessions with public officials, or determining what organizations with which to establish alliances.

Thus, the assembled grantee leaders were introduced to a picture of sustainability that derives from:

- Building and depending on members' involvement in setting organizational directions;
- Expanding the scope of the organization by establishing effective alliances with other organizations;
- Developing strategies for gathering resources and raising funds; and
- Putting the strategies to work.

It is possible to move ahead in all four of these areas at the same time. Every single detail of stakeholders' concerns does not have to be identified and addressed before an RCO can hold a special event to get the word out to the larger community. The appropriate approach to a sustainability effort is to move ahead on one front, while collecting information on others and developing strategies for future activities. "Keeping more than one ball in the air at a time enables you to progress faster," Liz noted.

Ten principles, shown in the following box, should underlie any sustainability effort. These principles also identify the basic steps in sustaining an organization. It is important to remember that, one does not have to complete step one before moving on to step two. In fact, most RCOs will be working in many of these areas simultaneously.

Ten Sustainability Principles

1. Know your issue, mission, organization, and self. Know the stakeholders, actors, prospects, and process.
2. Create early buy-in.
3. Identify, recruit, cultivate, and retain leaders.
4. Create successful collaborations and partnerships. Build healthy relationships at 10 levels:
 - Within the organization
 - With the community
 - With constituents
 - With volunteers
 - With staff
 - With leadership
 - With funders
 - With the media
 - With businesses
 - With legislators and policymakers.
5. Develop your case. Craft your story. Prepare a S.O.C.O. (Single Overriding Communication Objective) statement.

Think in terms of:

 - Audience
 - Message
 - Presenters.
6. Be seen in a crowd. Make news happen.
7. Make magic.
8. Expand your scope. Make a match to a donor's outlook and values.
9. Enlarge and diversify your funding base.
10. Make the "Ask!"

■ THE FORCE OF A COMPELLING IDEA

One key to sustaining an advocacy organization, Susan suggested, is having a compelling idea and communicating it forcefully to the larger world around you.

What is the compelling message of an RCO? Meeting participants suggested several possibilities, shown below:

Compelling Messages

- Recovery has a voice.
- That voice should be heard on treatment issues.
- There is a constituency movement for treatment and this is it.
- Stigma toward people in recovery must be erased.
- People need access to addiction treatment.
- Treatment can and should be better than it is.
- Appropriate treatment services must be expanded to underserved populations.

■ SUSTAINABILITY IS ABOUT RELATIONSHIPS AND COLLABORATION

Susan also noted that a major key to sustainability is relationships. These include relationships with members, the community, and other charitable organizations (yes, an RCO fits the bill as a charitable organization, which makes no profit and contributes its services on behalf of the recovery community). Other important RCO relationships are with public officials, members of the media, educational institutions, businesses, other nonprofits, and faith communities. Once an RCO focuses on building relations with these many different communities, it can become involved in collaborative efforts, and these collaborations help to sustain the RCO.

IT'S NOT EASY LEADING A COLLABORATIVE EFFORT

Collaboration is not easy. The RCO representative serving on the board of another community organization in a collaborative effort has

a tough job, Susan noted. “Difficult questions come to mind. Can you faithfully represent the RCO members’ wishes and still move work forward with a collaborative relationship? How much freedom do you have in making choices within the collaborative?”

A “Gain as Much as You Can” game was played to illustrate the skills needed to be a successful collaborator. Participants were divided into teams, with each team having an equal number of chips with smiling faces and frowning faces. Each team chose a negotiator who used the chips to negotiate deals with other teams. People soon found that negotiators who used smiling faces most of the time gained the most for their teams. Negotiators were concerned about violating their team members’ trust in their efforts to gain support from the collaborating teams. Playing the game illustrated some basic principles of collaboration and negotiating for a group’s agenda:

- Collaboration depends on trust and mutual respect.
- Trust and mutual respect grow as groups work together.
- People have to do things together to develop trust and respect.
- We are always weighing our own self-interests against the interests of the collaboration.
- We need to recognize when partners in our collaborations come with specific instructions and limits and with limited authority to speak for their organizations.
- When partners are from organizations of unequal status or resources, platitudes about how “we all gain from collaboration” are not convincing.

LOOKING FOR COLLABORATORS

Everyone who comes in contact with the RCO is a potential supporter, whether as a member who volunteers services and pays membership dues, an invitee to an RCO event, a community resident who comes to a social activity, the president of an organization advocating for treatment services for incarcerated persons with addiction, or the bank manager where the organization’s banking is done. The recovery community story, or important parts of it or a specially tailored version of it, can be shared with all of these people, and they may all be interested, in one way or another, in becoming collaborators or members.

Not all organizations will be collaborators, however. Relationships may be built and maintained using four different approaches, depending on the type of activity involved in the relationship: communication, coordination, cooperation, or collaboration.

■ LEVELS OF COLLABORATION

Among different organizations and individuals, relationships of different intensities will develop, with different expectations. The levels of intensity vary with the nature and type of relationship—communication, coordination, cooperation, or collaboration—and may change over time with the same organization or individual as a result of changing goals and emphases.

LEVELS FROM COMMUNICATION TO COLLABORATION

- **Communication**

Activity between two or more organizations with the purpose of sharing information and nonmaterial resources.

- **Coordination**

Activity between two or more organizations to prevent duplication of effort and assure that all needed operations are conducted.

- **Cooperation**

Activity among two or more organizations that aims at some integration of operations, while not sacrificing the autonomy of either party.

- **Collaboration**

A mutually beneficial and well-defined relationship which involves people from different organizations or sectors of the community joining together to achieve a common goal. Usually, that goal could not be achieved as efficiently (or at all) by an individual organization. The result is a highly shared endeavor in which members eventually commit themselves as much to the common goal as to the interests of their own organizations.

Media and Marketing Mind Set

- What is the mission of your project?
- What are its most important components?
- What are your most significant accomplishments?
- What are your most pressing challenges?
- What does your group do best?
- What type of image do you project to your stakeholders and the public?
- What type of image do you want to project?

After discussing the answers to these questions, as a group, craft and make a 15-second introduction, a S.O.C.O.:

“Hi, my name is _____. I am with _____ . We are the people who _____.”

Next, decide on some effective S.O.C.O. strategies, defining how and to whom you will target your message:

1. _____
2. _____
3. _____
4. _____

FUNDRAISING AND RESOURCE DEVELOPMENT

Susan and Liz reviewed the processes of resource development and fundraising, identifying the following steps:

1. Develop your:
 - Vision,
 - Mission statement, and
 - Case for support.
2. Identify *stakeholders*, *prospects* (people and organizations whose goals parallel the RCO's), and *suspects* (people and organizations who may be persuaded to support your RCO).

Sources of Funds and Resources

Shareholders' Giving

Board
Staff
Volunteers
Constituents

Resource Gathering

Time
Talent
In-kind services
(equipment, supplies)
Discounted services
Discounted products

Government

Federal
State
County
Local

Major Gifts

Individuals
Corporations
Foundations
Capital/special campaigns
Proposal preparation

Planned Gifts

Bequests

Annual Giving

Renewal

Campaigns

Fundraising events
Direct mail campaigns
Federated giving campaigns
Civic, social, and religious organizations

3. Do research on prospects and suspects, learning as much as possible about them and what is important to them.
4. Communicate with stakeholders about findings and intentions with the prospects and suspects.
5. Initiate relationships with prospects and suspects.
6. Cultivate relationships with all.
7. Create their buy-in.
8. Make the "Ask!"
9. Follow up.
10. Be a good steward.

■ SOURCES OF FUNDS AND RESOURCES

Both funds and resources can be sought successfully from many different sources, starting with **stakeholders**—the members of the RCO, board members, staff, and volunteers. A second source of support is **donations** of time, talent, or products. Another effective way to gather funds is through **annual giving campaigns**, in which people are asked each year to make a contribution to the group. Carefully crafted appeals can be made for another category of support, **major gifts** from such sources as individuals, corporations, and foundations. And the sixth source is **Government**—Federal, State, or local. The final category through which to seek support is **planned gifts**, such as bequests. There are advantages and challenges involved in obtaining contributions from each of these sources.

Most funds (85 percent of all giving in the U.S.) are obtained from **individuals**, who are more likely than other sources to support cutting-edge initiatives and to renew their budget support each year, if they are asked. However, it may take a long time (2-3 years, in some cases) to identify, interest, and involve them. Gifts from individuals are required to reach a budget goal, and the time of volunteers is needed to generate successful fundraising.

Funds also can be obtained by getting the RCO included in **federated giving campaigns** (e.g., Associated Black Charities, United Way). This approach to fundraising will involve relatively little effort on the part of the RCO, and it is a mark of honor to be included in a federated campaign because of the high standards demanded of those who participate. Payroll deductions make giving easy for many Americans. Sometimes, however, it is difficult to gain acceptance by those managing the campaigns. Increasingly, more accountability is being demanded of those who are accepted.

Government grants can provide a significant source of support, if the RCO fits the eligibility requirements, and possesses a good pro-

gram design and a good proposal writer. You will be competing against many applicants, and if you win a grant, it will only be for a limited period of time. Once you get a grant, there is always a chance that funding will be cut, and running a grant requires regular, detailed, and often lengthy reporting.

Corporations are the source of 5-7 percent of funds provided to non-profits, often providing seed support for new ventures. They are sometimes willing to take a risk and support controversial projects, and they can give big money. They rarely fund operating support, and put a lot of emphasis on applicants' having diverse sources of support. And, if the funded project does well, they may want to take some of the credit.

Foundations give less than 10 percent of the total charitable support in the U.S. each year and can be trendy in their giving, rarely funding support for operations. They tend to support specific programs with measurable results, for which they can take the credit. They generally require that not-for-profit organizations document diverse sources of funding.

■ SOME FUNDING BASICS

Many different types of fundraising activities can be conducted by the RCO—from golf tournaments to rock and roll festivals (SoberFests) to community picnics to silent auctions. Some grantees reported that they sell training provided by their members on how to be a good consumer; others find out what services people need and provide them for a fee. Some of these have included fence painting by people in wheelchairs, maintenance services provided by people in recovery, and tax advice prior to tax time provided by qualified members of the RCO. “It’s a good idea to get the business people among your stakeholders to help you think through all the important details of providing services,” one participant suggested. “Or you may have to recruit a business advisor. Remember, that advisor may become a strong ally and supporter of the RCO.”

Developing a media list is important to sustainability, along with identifying particular reporters who are interested in the RCO’s story and working with them to build a continuing relationship. Calling these reporters with the recovery angle on news stories that break in the community and feeding them story ideas from time to time were both noted by participants as being effective awareness-building tools. And, the more RCO-related stories that get in print, the more people

will know about the RCO, increasing the chance that people will contribute financial gifts when asked to do so.

All of these relationships are with people and organizations that, in effect, become resources of the RCO. One member may contribute to decision-making, another member may know a rock and roll band that will lower its rate for an RCO dance because the leader is in recovery, the media might put the recovery angle on a news event because of what they've learned from the RCO, and the bank manager may be able to get her institution to contribute funds to sponsor a recovery softball team in the city recreation league.

In effect, these actions all help to build a sustainability pyramid, with the primary stakeholders, RCO members, constituting the base. To get stakeholders involved originally, the RCO tells its story. When the stakeholder base is solidly entrenched, the RCO can begin to apply the ideas in its story to resource development and raising funds. It will identify potential prospects, research them, communicate with stakeholders about them to develop strategies, and begin cultivating relationships with prospective donors of resources and funds. Then, the donors, such as those invited to an awards dinner honoring a community hero, will constitute the tapering layers of the pyramid above the stakeholders.

The higher levels of the pyramid are constructed when the RCO begins approaching major givers and achieves its first success. When approaching those who give the biggest gifts, such as foundations, corporations, or wealthy leaders in the community, it may become necessary to craft a carefully developed Case for Support, another form of story. This can be modified for use with different potential funding targets.

When approaching the big givers, the RCO should still use the same techniques it used to attract members or obtain services at low cost or when it developed alliances with collaborating organizations. Many successful fundraisers seek to build relationships or develop collaborative project goals with funding organizations. These may be built over time, in a series of planned visits or contacts with the organizations before getting to the point of requesting funds. The RCO needs to get to know them, and they need to get to know the RCO, as well as its compelling story and its aims and goals.

THE GIVING PIE

The standout item in the big picture on charitable giving is that the vast majority of every charitable dollar is given by individual citizens. In 1998, giving by individuals and their estates comprised 85 percent of all giving. Foundations gave only 9.8 percent and corporations,

only 5-7 percent. This is food for thought for RCO fundraisers, who may be able to identify creative methods of securing funds from individuals in local communities. Another way is to carefully develop collaborative relationships with other organizations; these relationships can lead to scenarios in which allied organizations receive funding together or benefit in other tangible ways from the relationship they developed together. Other organizations that share some or all of your goals can help you work toward achieving some of yours, as you help them work toward the achievement of some of theirs.

Just think what might be accomplished by holding a luncheon honoring people who have made significant career or service contributions to improving their communities since they entered recovery, and carefully inviting key professional, civic, and business leaders to attend.

GETTING THE BUY-IN WITH YOUR STORY

Whether recruiting new members or asking a local business to support an activity, the RCO has to take steps to ensure their buy-in to the organization's mission, vision, and case for support.

It helps to brainstorm by making a list of people, organizations, and systems who currently have a special interest, or should have, in the activities and accomplishments of your project. For each one you want to involve in your RCO, identify what's in it for them (from their perspective), and what's in it for you. Also identify key risks to them and key risks to you. Addressing these issues will help to address the points they will be most interested in when you tell them your story.

■ GETTING THE BUY-IN WITH YOUR CASE FOR SUPPORT

The **Case for Support** requests support for a relevant and urgent need, and moves people to respond both logically and emotionally. *It reveals a solution to meeting an unmet need.* It specifies the resources required to meet the need—increased funding, changes in public policy, expanded collaborations, etc. The Case for Support also focuses on what sets the proposed initiative apart from similar endeavors and assures its relevance to the community. In the final analysis, it causes people to feel that they have a chance to make history and that the time for action is now.

Story Telling

To advance your effort, you need to tell your “story.”

Tell it, using:

- Language and symbols
- Concepts and concrete examples
- Facts and feelings.

Your story should:

- Highlight accomplishments and challenges
- Be inspiring and informative
- Speak to an audience’s frustrations
- Generate feelings of hope and optimism
- Capture the audience’s hearts and minds
- Convey a sense of power
- Be clear and to the point
- Be told over and over again
- Build bridges and relationships
- Foster a well-defined, do-able response
- Offer hope—address both the rain and the building of the Ark.

Some other important outcomes of developing and sharing the Case for Support include:

- Attracting support for the solutions the initiative wishes to accomplish;
- Building consensus and buy-in;
- Increasing stakeholder commitment;
- Attracting volunteers to contribute to fund raising, program activities developing public policy positions, etc.;
- Building community awareness;
- Researching and collecting valuable community attitudes; and
- Testing marketplace readiness.

The Case for Support is prepared in two primary stages: 1) development and 2) writing. Stage one involves thinking of leaders in your organization who can assist in shaping the case and getting ideas from individual members or the entire membership to help develop a richer case. Keeping members informed about the case will ensure their buy-in and sense of ownership. Stage two, writing, may be done by just one person.

The co-facilitation team also presented an outline for the Case for Support (see next page).

STAGES OF THE “ASK”

Participants at the grantee meeting learned that nonprofits that are successful in obtaining funds from foundations, corporations, and donors need to plan and go through seven stages: research and preparation, opening, discovering, presenting the ask, listening, responding, and reaching an agreement and understanding.

1. Research and Preparation

Conduct research about the prospect, its interests, goals, and objectives. Learn as much as possible by contacting the organization, asking questions of staff, obtaining and reviewing literature. Ask for information about grants and programs the donor has funded.

Continued on Page 32

OUTLINE FOR CASE FOR SUPPORT

1. Mission

Describe why your group exists and the assistance you need to achieve your vision.

2. Achievements

Establish your group's expertise and describe its past achievements. Explain its relevancy. Reveal how it affects the environment. The big picture.

3. Problem (or opportunity)

Convey what needs to be addressed today. Incorporate logic and emotion.

4. Trends affecting the problem (or opportunity)

Demonstrate your knowledge and insight.

5. Response to the problem (or opportunity)

Unfold the answer—how your initiative will respond to the need, to the trends. Incorporate urgency.

6. Needed resources

Describe what you have and what you need.

7. Role of the prospective donor

Discuss how the donor can help, and how you can help the donor achieve its own goals. Share possible recognition opportunities.

8. Summary

Describe how the support will meet the need, how success will be evaluated, and how the situation will be addressed in the future. Keep the perspective big.

9. Attachments

Might include: Leadership lists, anecdotal stories, case studies, budgets, program or project plans, statistics, 501(c)(3) status, letters of support, newspaper articles, recognitions, photographs.

Tips on Writing Your Case for Support

- Write in the present tense, as though your strategies were already reality.
- Include distinctive and innovative programs. Give examples of supporters, illustrations, and case histories of the RCO's success stories.
- Keep the case simple and brief. Do not drown readers in data. All the "vital statistics" belong in attachments.
- Highlight evidence of the planning behind the program. It shows prospects that your group is managed in a businesslike way.
- Anticipate questions. Answer particular concerns that you expect readers to ask, whether they are volunteers, members, legislators, administrators, business people, faith community leaders, annual givers, or major funders.
- Be concrete and specific. Do not say: "Our initiative is a model of success." Tell what makes it successful.
- State your goals in positive terms and relate what the organization is, rather than what it is not.

Prepare by determining what parts of your story to emphasize and analyzing how best to frame it, in relation to the interests and aims of the potential funder. Let them know you are interested in seeking funding.

2. Opening

Establish a relationship with the potential funder by explaining your mission and identifying your needs. Remember to cast your story in relation to the objectives of the funding organization.

3. Discovering

From your opening contacts with the potential source of support, learn about the organization's motivations and its frame of reference and perspective.

4. Presenting the "Ask"

Frame your presentation from the prospect's perspective. Try to capture the heart and mind of the person you are dealing with, as well as the organization. Describe what the organization can do to:

- Help advance your mission.
- Address your current needs.
- Satisfy the organization's interests.

5. Listening

Identify overt and hidden objections to the "Ask."

6. Responding

Attempt to overcome objections.

7. Reaching Agreement and Understanding

- If the prospect makes any type of commitment, follow up immediately.
- If the prospect is uninterested or unwilling, attempt to establish the opportunity to make contact at another time, and then follow through.

1. Remember that to ask is to cultivate.

Asking for a gift is one of the best cultivation strategies, as long as you don't ask prematurely.

2. Don't focus on your request.

Focus on the prospect. Remember the RCO is not at the center. This discussion is about your work, but it is driven by the donor.

3. Create a dialogue, not a monologue.

Don't just talk about your organization. Listen to what the prospect says. Watch his or her reaction to what you say. Use this opportunity to create meaningful conversation.

Don't be forced or artificial. Get to know the person better. Create a bond of respect and trust.

MEETING REPORT NO. 3

Day Three: The RCSP Case Study

Before the December 1999 meeting, grantees had been told that the RCSP grant's requirement to produce a case study did not mean that they were expected to conduct rigorous research or quantitative evaluation. They had been told that CSAT wanted them to recount their experiences and share the lessons they learned.

However, it was still not easy to write about the nature of the grantees' experience, looking at how events and experience had transpired. "It was hard to believe that CSAT," as one RCSP project director put it, "really wanted to learn how and why something happened, and what we learned from it."

Mike Cannon and Carolyn Davis, members of the RCSP technical assistance staff, gave a presentation designed to help grant leaders understand CSAT's aims for the case studies. The documents are to become vehicles for informing the recovery and treatment fields about the RCSP and providing guidance to those who attempt to form recovery community organizations in the years ahead. CSAT intends to take the information from the case studies, collectively, and synthesize it for the field.

Mike and Carolyn likened case study writing to keeping a ship's log. "When you plan a ship's journey, you pick a destination, chart a course, select a captain, select a crew," Mike said. "Once the journey starts, the captain keeps a log for every day of the week, recording significant and seemingly insignificant events, such as what the crew is experiencing, where in the course of the journey troubles were encountered, and how they were addressed." They also noted that telling the story of a grant is similar to telling one's story of recovery in a 12-Step or other recovery meeting.

■ QUESTIONS TO ASK YOURSELF WHILE WRITING

Carolyn presented some questions an RCO can ask itself in preparing to write its story. These questions will make the job easier by serving as prompts for writing.

What do the field and other RCOs need to know?

- What did we try to do?
- With which target groups?
- Using what strategies?
- What happened when we tried?
- What was the nature of our experiences?

What happened in recruiting?

- Whom did we try to engage? Why?
- How did they react? Why?
- Were our messages understood?
- What ideas stimulated the most interest?
- Around what issues did our target audience coalesce?

What problems did we have with:

- Organizing a viable group?
- Building a community?
- Structuring the project?
- Identifying and training leaders?
- Managing power in the group?
- Planning versus taking action?

What other problems did we have?

- What skills did members need help with?
- What skills did **we** need help with?
- How were goals set and accomplished?
- How did our thinking change?

What could the field benefit from knowing?

- Did we have to change our course?
- What have we learned?
- Have we had to redefine our strategies or messages?
- Where do we need help?
- What kinds of help do we need?

Keep it simple!

- What?
- Why?
- When?
- How?
- For whom?
- By whom?
- With whom?
- To what end?
- With what impact?
- With what learning?

Ways to keep it simple:

- Put function before form.
- Think of a ship's log . . .
... or a letter describing a trip . . .
... or an e-mail correspondence . . .
... or a chat-room conversation.
- Review mental notes to yourself.
- Outline your story.
- Interview each other; take notes.
- Assign different parts of the story to different people.
- Don't worry about what anyone will think.

Remember why we're on this journey:

- So the recovery community will have a voice in setting policies that affect opportunities for recovery.
- To reduce the stigma that impedes recovery.
- To reduce the misery and costs of addiction to individuals, families, and communities.

Remember why the story is important:

- So other groups can start the journey.
- So they can learn from our experience.
- So they can get help from all our groups and from CSAT.

Tell the story . . .

- HOW IT WAS
- WHAT HAPPENED
- HOW IT IS NOW

Help provide for the future of the recovery movement . . .

By telling our stories!

Meeting Agenda

DECEMBER 6 - 8, 1999

MONDAY, DECEMBER 6

| TIME | EVENT |
|------------------|--|
| 8:30 - 9:00 a.m. | Welcome Rick Sampson, Director <i>Division of State and Community Assistance (DSCA)</i> <i>Center for Substance Abuse Treatment (CSAT)</i> <i>Rockville, MD</i> |
| | Meeting Overview Catherine D. Nugent, Project Officer <i>Recovery Community Support Program</i> <i>CSAT/DSCA</i> <i>Rockville, MD</i> |
| 9:00 - 9:30 a.m. | Keynote Address: From Personal Recovery to Community Activism Henry Lozano, President and CEO <i>Californians for Drug Free Youth, Inc.</i> <i>Big Bear City, CA</i> |

9:30 - 10:30 a.m.

Exercise: Revisiting Your Grant Goals, Strategies, and Activities

Elizabeth Burden, Facilitator

*Burden & Burden Consultancy
Tucson, AZ*

10:45 - 11:45 a.m.

Panel Presentation: Examples of Effective RCSP Advocacy

MODERATOR:

W. Barry Blandford, Project Officer

*Recovery Community Support Program
CSAT/DSCA*

Rockville, MD

Coco Gumacal, Project Director

*Recovery Community Support Program
and Self-Advocacy Activities*

*California Association of Alcohol and Drug
Program Executives*

Sacramento, CA

Mary Kronquist, Project Director

Project Vox

*National Council on Alcoholism and Drug
Dependence of Michigan*

Lansing, MI

Heather Lyons, Lead Organizer

*Recovery Association Project
Central City Concern*

Portland, OR

Bob Savage, Project Director

*Connecticut Community for Addiction
Recovery*

Wethersfield, CT

11:45 a.m. - 12:15 p.m.

**Presentation and Discussion:
Acceptable Advocacy versus
Prohibited Lobbying**

June Gertig, Project Director

*RCSP Technical Assistance Project
Washington, DC*

1:30 - 2:00 p.m.

**Continuation of Discussion on
Acceptable Advocacy versus
Prohibited Lobbying**

FACILITATORS:

June Gertig

Elizabeth Burden

2:00 - 2:30 p.m.

Panel Presentation: Advocacy Issues

MODERATOR:

Catherine D. Nugent

Access

Sarah Kayson, Director of Public Policy
*National Council on Alcoholism and Drug
Dependence
Washington, DC*

Treatment Systems

Neill Miner, Operations Director
*New England Institute of Addiction Studies
Augusta, ME*

Recovery Issues

Paul Samuels, President
*Legal Action Center
New York, New York*

2:45 - 3:15 p.m.

**Presentation: A Case Study of
Effective Organizing with the
HIV/AIDS Consumer Constituency
(Understanding Advocacy Readiness
in the HIV/AIDS Community)**

Patricia Hawkins, Ph.D., Associate
Executive Director

*Whitman-Walker Clinic
Washington, DC*

3:15 - 4:00 p.m.

**Discussion: Promoting Advocacy
Readiness in the Recovery
Community**

FACILITATORS:

Catherine Nugent

Elizabeth Burden

- 4:00 - 5:15 p.m. **Discussion: First Thoughts on "Taking It National"**
 FACILITATOR:
 Rick Sampson
- 6:00 - 7:00 p.m. 12-Step Meetings
 AA
 NA
 AlAnon

TUESDAY, DECEMBER 7

- 8:30 a.m. - 5:00 p.m. **Workshop: Tools for Sustaining Your RCSP Activities After Federal Funding Ends**
 FACILITATOR:
 Susan Hailman, Trainer/Consultant
Campaign Consultations
Baltimore, MD
- CO-FACILITATOR:
 Elizabeth Burden, Facilitator
Burden & Burden Consultancy
Tucson, AZ
- 8:30 - 9:00 a.m. **Sustainability and Funding Basics**
- 9:00 - 10:00 a.m. **Developing Stakeholders**
- 10:00 - 10:30 a.m. **Building Your Case for Support**
- 10:45 - 11:30 a.m. **Continuation of Building Your Case for Support**
- 11:30 - 12:00 noon **Marketing and Media**
- 1:00 - 1:30 p.m. **Continuation of Marketing and Media**
- 1:30 - 2:30 p.m. **Collaboration**
- 2:30 - 3:15 p.m. **Resource Development**
- 3:30 - 4:00 p.m. **Continuation of Resource Development**
- 4:00 - 5:00 p.m. **Role Play**

6:00 - 7:00 p.m.

12-Step Meetings

AA

NA

AIAnon

WEDNESDAY, DECEMBER 8

9:00 - 11:30 a.m.

**Concurrent Work Sessions or
TA On-the-Spot**

Work Session #1: RCSP Products and Materials - To discuss technical assistance documents that would be helpful to current grantees, future cohorts of RCSP grantees, and the recovery field in general.

FACILITATORS:

Carolyn Davis, Senior Writer

COSMOS Corporation

Bethesda, MD

June Gertig

Work Session #2: RCSP Spring Conference - To help shape conference agenda and Call for Papers for April RCSP Conference.

FACILITATORS:

Cathy Nugent and Elizabeth Burden

TA On-the-Spot: Optional individual consultation with a technical assistance provider.

CONSULTANTS:

Catalina Bartlett, Independent Consultant

Washington, DC

Michael Cannon, Senior Analyst

COSMOS Corporation

Bethesda, MD

Susan Hailman, Trainer/Consultant

Campaign Consultations

Baltimore, MD

James Hickman, Independent Consultant
Falls Church, VA

Rick Sampson

11:45 a.m. - 2:00 p.m.

**Working Lunch: RCSP Case Study
Requirements and Resources**

Michael Cannon

June Gertig

2:15 - 2:45 p.m.

**Brief Reports from Morning Work
Session Meetings**

2:45 - 3:00 p.m.

Next Steps

3:00 p.m.

Adjournment