

Recovery Education Center META Services, Inc.

Policy Guidelines

MISSION:

People will learn skills and tools that promote recovery, *discover who they are, what they can be, and the unique contributions they have to offer.*

BACKGROUND:

The Dynamics of Using Recovery Principles

Recovery is a paradigm shift that offers an approach to wellness inherently different from traditional treatment. Recovery, in fact, is not a “treatment” in that it is not a service being executed by an outside party. The recovery process is initiated and carried out by the person. It offers a way for people to take control of their life, to move beyond the consequences of their circumstances and the effects of stigma and discrimination. Our preferred method of encouraging and supporting this change is through an educational process, which is available to people who are interested in recovery.

In the context of recovery, the role of the person is significantly expanded beyond that of waiting to be cared for, to that of learning how to take charge of his or her own healing process. The person is seen as a “whole person” instead of a “collection of symptoms”. They are no longer “cases to be managed”, but rather, are the key informant in their quest for wellness. The educational approach avoids positioning the person in a “patient role” and focuses on each person’s inherent strengths, abilities, and capacity to learn new skills for living and for developing personal growth, mutuality, and recovery.

POLICY GUIDELINES:

Introduction:

Given the vision and mission of the REC, a traditional approach to developing policies and procedures did not seem like the most effective method of disseminating guidelines for operational purposes. The challenge was to create policy guidelines that could be directly related to the vision and mission, and to also be user friendly. The key factors that needed to be addressed by policies and procedures were attitude, behavior and environment. Policy guidelines also needed to be easily understood, and application needed to be obvious. In order to accomplish this, a new approach to policy development has been implemented through a series of letters from the Director, which are sent to each employee.

Policy Dissemination:

New employees are given a packet of policy letters during new hire orientation classes, and the direct supervisor reviews them with each new employee. When new letters are written, they are sent to each employee, and also kept in a binder at the work site for easy reference.

Policy Topics:

The following topics have been chosen as key areas to provide consistent guidance through policy direction. These areas are very important in the development of a recovery-based organization.

Leadership: Emotional Intelligence Domains and Associated Competencies; Leadership Styles and Leadership Competencies.

Attitude: Responsible and Professional Work; Care of the Spirit; Working Beyond Symptoms.

Behavior: Recovery Tune-up; If we must have enemies, let's try to learn from them; Working with "Boundaries"; When Someone Needs a Little More Support; Reporting Incidents; ValueOptions Incident Report.

Environment: Resolving Disagreements with Each Other; Releasing Information; Socializing Opportunities.

Paperwork: Welcome Letter; Paperwork Flow Sheet; Completing Paperwork; Reviewing Paperwork; Turning in Paperwork.

Personal Growth: Taking New Ground; Already Good Enough.

Organizational Structure:

META Services is organized as a non-profit corporation and is tax-exempt (501.C.3). Recovery Education Center shares the same non-profit charitable status making it eligible for federal and foundation grant funding. The META Board of Directors and the REC Advisory Board work closely together to assure a consistent source of direction and support for the REC. To this end, the REC Advisory Board includes at least two members of the META Board of Directors. The REC is under the direction of an Executive Director reporting directly to the Board of Directors.

You probably know that most organizations have things called "policies and procedures". These are usually written documents, designed to keep the organization on track, that are kept in big binders and collect a lot of dust and take up a lot of room. Every once in a while, the rules change, and someone takes the binder out, dusts it off, changes the words, then they make everyone read the new policy. Most people don't read them.

At the REC, we aren't going to do that. It just isn't our style. There are rules out there that we have to follow, as you will probably remember from "new hire orientation" but for the most part, we are in a position of having to "make some things up as we go along" since we're pioneers in this endeavor. So what we're going to do is send out a letter, probably every week, that reinforces our values and our mission. The letters will be about issues that come up in the course of our work that we are either struggling with, or having "breakthroughs" in, that would be good to share with each other. Hopefully we can use this process as a way to provide guidance to each other, keep in touch, and stay on track. So in the near future, stand by for letters. If you have any questions about the letters and need some clarification, please check with your program manager.

Now since this is, in a way, the first letter, seems like I should say something inspiring. When I think of what inspires me most these days, well, it's you. I was looking at the numbers the other day, and was very impressed with what's happening with Peer education and employment. Not counting the first class (it was experimental) and not counting the current class (they haven't graduated yet), 99 people have completed the Peer Support Training. Around 70 of those graduates are now employed and are passing forward to others what they learned about recovery. Isn't that remarkable? Also, only 4 people have dropped out, one of those for a job we found for them in a different company. I am so grateful for your commitment to recovery, and to helping others recover. You are truly an awesome group of people who I am very proud to be associated with. Thank you, thank you, thank you for being who you are and doing what you're doing.

Lori

Leadership is a very important quality for all of us to have. Peer Support staff are in a wonderful position to exhibit leadership skills because you serve as such a wonderful role model to those you work with on a daily basis. Peer Team Leaders are expected to develop even more leadership skills, since they are in a role to give you guidance and support. I want to encourage each and every one of you to take responsibility for continuing to develop your leadership skills. Program Administrators and Team leaders are required to take the leadership training given here at META, and all interested employees are encouraged to take the class also. I've attached some summary material that we use for your review. If you like this information, and want to study further, you can check the text out of the library entitled Primal Leadership, written by Daniel Goleman who is a leading author on the subject of Emotional Intelligence.

As a Peer employee, you automatically inherit the job of being a role model. This is an important point to remember, since people will be looking up to you and learning from you – not just what you say in class, or in one to one conversations, but in how you handle stressful situations, conflicts, relapses and challenges, as well as how you have good times, celebrate, and grow to new heights. You've heard the saying “your actions speak so loud that I can't hear what you're saying” and this is particularly true in your situation. People will be saying, “If you can do it, so can I” and they'll be looking closely to see how you are living recovery. Refer to the “Recovery Tune up” for more information on this topic.

There is another part of leadership that I want to be sure and cover, because it is often overlooked, and that's what I'll refer to as “Leading up”. It's common to think of leadership as being “top-down”. By this I mean that we sometimes get into the mindset of waiting for the leaders to tell us what to do. This is OK, but if you operate from this perspective, you are missing an opportunity to really have your leadership skills make a big difference. “Leading up” refers to the leadership you provide in your relationship with your boss. A good “Leader-up” will be thinking of better ways to get the job done; will have a vision of the next steps in creating more good outcomes, expanding, and problem solving. So I want to encourage you to “Lead-up”, and do it in a way that really serves you and our organization. You won't always get your way, but you'll give the rest of us something to think about, which will keep us all thinking about how to do the best we can.

Lori

EMOTIONAL INTELLIGENCE

LEADERSHIP COMPETENCIES

SELF - AWARENESS

- *Emotional self-awareness.* Leaders high in emotional self-awareness are attuned to their inner signals, recognizing how their feelings affect them and their job performance. They are attuned to their guiding values and can often intuit the best course of action, seeing the big picture in a complex situation. Emotionally self-aware leaders can be candid and authentic, able to speak openly about their emotions or with conviction about their guiding vision.
- *Accurate self-assessment.* Leaders with high self-awareness typically know their limitations and strengths, and exhibit a sense of humor about themselves. They exhibit a gracefulness in learning where they need to improve, and welcome constructive criticism and feedback. Accurate self-assessment lets a leader know when to ask for help and where to focus in cultivating new leadership strengths.
- *Self-confidence.* Knowing their abilities with accuracy allows leaders to play to their strengths. Self-confident leaders can welcome a difficult assignment. Such leaders often have a sense of presence, a self-assurance that lets them stand out in a group.

SELF-MANAGEMENT

- *Self-control:* Leaders with emotional self-control find ways to manage their disturbing emotions and impulses, and even to channel them in useful ways. A hallmark of self-control is the leader who stays calm and clear-headed under high stress or during a crisis—or who remains unflappable even when confronted by a trying situation.
- *Transparency.* Leaders who are transparent live their values. Transparency—an authentic openness to others about one’s feelings, beliefs, and actions—allows integrity. Such leaders openly admit mistakes or faults, and confront unethical behavior in others rather than turn a blind eye.
- *Adaptability.* Leaders who are adaptable can juggle multiple demands without losing their focus or energy, and are comfortable with the inevitable ambiguities of organizational life. Such leaders can be flexible in adapting to new challenges, nimble in adjusting to fluid change, and limber in their thinking in the face of new data or realities.
- *Achievement.* Leaders with strength in achievement have high personal standards that drive them to constantly seek performance improvements — both for themselves and

- *Initiative.* Leaders who have a sense of efficacy—that they have what it takes to control their own destiny—excel in initiative. They seize opportunities—or create them— rather than simply waiting. Such a leader does not hesitate to cut through red tape, or even bend the rules, when necessary to create better possibilities for the future.
- *Optimism.* A leader who is optimistic can roll with the punches, seeing an opportunity rather than a threat in a setback. Such leaders see others positively, expecting the best of them. And their “glass half-full” outlook leads them to expect that changes in the future will be for the better.

SOCIAL AWARENESS

- *Empathy.* Leaders with empathy are able to attune to a wide range of emotional signals, letting them sense the felt, but unspoken, emotions in a person or group. Such leaders listen attentively and can grasp the other person’s perspective. Empathy makes a leader able to get along well with people of diverse backgrounds or from other cultures.
- *Organizational awareness.* A leader with a keen social awareness can be politically astute, able to detect crucial social networks and read key power relationships. Such leaders can understand the political forces at work in an organization, as well as the guiding values and unspoken rules that operate among people there.
- *Service.* Leaders high in the service competence foster an emotional climate so that people directly in touch with the customer or client will keep the relationship on the right track. Such leaders monitor customer or client satisfaction carefully to ensure they are getting what they need. They also make themselves available as needed.

RELATIONSHIP MANAGEMENT

- *Inspiration.* Leaders who inspire both create resonance and move people with a compelling vision or shared mission. Such leaders embody what they ask of others, and are able to articulate a shared mission in a way that inspires others to follow. They offer a sense of common purpose beyond the day-to-day tasks, making work exciting.
- *Influence.* Indicators of a leader’s powers of influence range from finding just the right appeal for a given listener to knowing how to build buy-in from key people and a network of support for an initiative. Leaders adept in influence are persuasive and engaging when they address a group.
- *Developing others.* Leaders who are adept at cultivating people’s abilities show a genuine interest in those they are helping along, understanding their goals, strengths,

- *Change catalyst.* Leaders who can catalyze change are able to recognize the need for the change, challenge the status quo, and champion the new order. They can be strong advocates for the change even in the face of opposition, making the argument for it compellingly. They also find practical ways to overcome barriers to change.
- *Conflict management.* Leaders who manage conflicts best are able to draw out all parties, understand the differing perspectives, and then find a common ideal that everyone can endorse. They surface the conflict, acknowledge the feelings and views of all sides, and then redirect the energy toward a shared ideal.
- *Teamwork and collaboration.* Leaders who are able team players generate an atmosphere of friendly collegiality and are themselves models of respect, helpfulness, and cooperation. They draw others into active, enthusiastic commitment to the collective effort, and build spirit and identity. They spend time forging and cementing close relationships beyond mere work obligations.

Emotional Intelligence Domains and Associated Competencies

PERSONAL COMPETENCE: These capabilities determine how we manage ourselves.

SELF-AWARENESS

- *Emotional self-awareness:* Reading one's own emotions and recognizing their impact; using "gut sense" to guide decisions
- *Accurate self-assessment:* Knowing one's strengths and limits
- *Self-confidence:* A sound sense of one's self-worth and capabilities

SELF-MANAGEMENT

- *Emotional self-control:* Keeping disruptive emotions and impulses under control
- *Transparency:* Displaying honesty and integrity; trustworthiness
- *Adaptability:* Flexibility in adapting to changing situations or overcoming obstacles
- *Achievement:* The drive to improve performance to meet inner standards of excellence
- *Initiative:* Readiness to act and seize opportunities
- *Optimism:* Seeing the upside in events

SOCIAL COMPETENCE: These capabilities determine how we manage relationships.

SOCIAL AWARENESS

- *Empathy:* Sensing others' emotions, understanding their perspective, and taking active interest in their concerns
- *Organizational awareness:* Reading the currents, decision networks, and politics at the organizational level
- *Service:* Recognizing and meeting follower, client, or customer needs

RELATIONSHIP MANAGEMENT

- *Inspirational leadership:* Guiding and motivating with a compelling vision
- *Influence:* Wielding a range of tactics for persuasion
- *Developing others:* Bolstering others' abilities through feedback and guidance
- *Change catalyst:* Initiating, managing, and leading in a new direction
- *Conflict management:* Resolving disagreements
- *Building bonds:* Cultivating and maintaining a web of relationships
- *Teamwork and collaboration:* Cooperation and team building

LEADERSHIP STYLES

VISIONARY

HOW IT BUILDS RESONANCE: Moves people toward shared dreams

IMPACT ON CLIMATE: Most strongly positive

WHEN APPROPRIATE: When changes require a new vision, or when a clear direction is needed

COACHING

HOW IT BUILDS RESONANCE: Connects what a person wants with the organization's goals

IMPACT ON CLIMATE: Highly positive

WHEN APPROPRIATE: To help an employee improve performance by building long-term capabilities

AFFILIATIVE

HOW IT BUILDS RESONANCE: Creates harmony by connecting people to each other

IMPACT ON CLIMATE: Positive

WHEN APPROPRIATE: To heal rifts in a team, motivate during stressful times, or strengthen connections

DEMOCRATIC

HOW IT BUILDS RESONANCE: Values people's input and gets commitment through participation

IMPACT ON CLIMATE: Positive

WHEN APPROPRIATE: To build buy-in or consensus, or to get valuable input from employees

PACE SETTING

HOW IT BUILDS RESONANCE: Meets challenging and exciting goals

IMPACT ON CLIMATE: Because too frequently poorly executed, often highly negative

WHEN APPROPRIATE: To get high-quality results from a motivated and competent team

COMMANDING

HOW IT BUILDS RESONANCE: Soothes fears by giving clear direction in an emergency

IMPACT ON CLIMATE: Because so often misused, highly negative

WHEN APPROPRIATE: In a crisis, to kick-start a turnaround, or with problem employees

Well, it's time for your weekly policy letter. As this week has unfolded, I've seen several things happen that were pretty amazing, so I thought we should have a policy about them. I think the name of this policy should be "NO MATTER WHAT!!!!" This seems appropriate, since many things would not have been accomplished this week if some of you hadn't quietly adhered to "NO MATTER WHAT". Mostly these accomplishments were about little things; just everyday occurrences that don't make the headlines. Things that could go unnoticed—until they grew into big problems anyway--things that are so common that we don't usually think to say "Thank you". BUT, someone said, "I'm going to take care of this, No Matter What." And they did.

This "no matter what" type of commitment, or attitude, is what makes big things happen. It's about doing the little seemingly unimportant things that have to get done, even when we don't feel like it, that keeps us moving toward recognizable thought and it motivates us to do things simply because they have to get done.

I've seen this quality all week from almost everyone I've come in to contact with in the REC and I'm very impressed and inspired by it. It represents a level of maturity and dignity that overshadows symptoms, misunderstandings, disagreements and insecurities, and moves us to individuality and collectively toward recovery. So thank you all very much for your "No Matter What" attitude. We have some important and wonderful work to do together and I have no doubt that we'll be successful beyond our wildest dreams.
Keep up the good work,

Lori
xoxo

Interesting, isn't it that it's only been in the past few years it's been OK to talk about spiritual things in the same breath as psychiatric symptoms. I guess this probably goes all the way back to Sigmund Freud, who was not at all enchanted with the idea of spirituality. His friend at the time, Carl Jung, tried to help him understand, but to no avail. In fact, their friendship ended, in part, over this very issue. Since the world sided with Dr. Freud, as opposed to Dr. Jung, the Freudian form of thought prevailed. Since then behavioral health folks have cooked up a lot of reasons to avoid the topic altogether. The prevailing reason often cited is that the therapist would be incorporated into people's system of thought, which could lead to dangerous situations for both parties.

Thank God for those consumers (or, as we have come to call ourselves "people with lived experience") who began to write about the positive impact of their spiritual strengths! Once again, they get most of the credit for initiating the correction to a serious misconception. It was in reviewing the writings of these people that researchers began to see the important role spirituality plays in the healing process from mental illnesses. Over and over again, people mention the important role spirituality had played in their recovery.

There seems to be a difference between spirituality and religion -- with religion being a certain kind of structure in which one practices spirituality, and spiritually being something one has inside them that can be practiced in or outside of any particular structure. So whether you enjoy belonging to a certain religious organization, or whether you like to meditate in your back yard, developing a way to nurture and strengthen your spirit is an important part of recovery, if you choose to develop it.

I would be the last person to tell anyone how to discover and develop their spirit. This is a very personal journey and a mystery that everyone needs to discover in their own way. However, I'd be the first to suggest we all try. The strength of the spirit is an amazing source of power that can carry us through very tough times. If you're interested in discovering your spirit, the first step is really easy -- you just have to get quiet and listen for a while. It doesn't matter what your beliefs are, or what church you belong to, we can all learn to listen. Wouldn't it be a nice compliment to hear from your "Higher Power", or what ever you want to call it, that you were a good listener?

I have a friend who says "we are not human beings having a spiritual experience, we are spiritual beings having a human being experience." Now, if this is the case, getting in touch with our spirit could open up a whole new level of being for us. So I want to encourage you to get to know your spirit, and take care of It, so It can take care of you.

Lori
xoxo

Not all of you had the pleasure of knowing Chuck B., who was a student in the last Peer Support Class. Chuck had to drop out of class during the last few sessions due to a physical illness. I met him on the first day of class when Ann asked me to come in and talk about recovery. After talking for a while, I asked the students to talk a little bit about their own journey, and what brought them to the class. Chuck listened to what everyone else had to say, and was the last person to raise his hand. He spoke in a deliberate, confident voice, and I'll never forget what he said. "I'm Chuck, and I think I'm finally ready to stop hiding behind my symptoms...What I mean is, I want to learn to not be afraid of my symptoms, and not use them as a reason to stop growing."

I saw Chuck a few times after that -- usually in the hall upstairs when the class was on break. He seemed to not be afraid of symptoms, or anything else for that matter. I remember thinking, "Now there's a free spirit!!!" My thoughts were confirmed that evening when Gene came home from work and told me about talking to Chuck..."I was sitting in my office this morning, feeling really frustrated and cranky, when I looked up from my desk and saw that guy named Chuck.... You know, the 'Chuck' in the class. He had some dollar bills in his hand, pulled up his shirt, and said 'I earned this money from belly dancing!!' What could I say? He changed my whole day with his free spirit."

Last Monday Ann left this message on my desk: "Chuck B. passed away yesterday."

I didn't have the pleasure of getting to know Chuck very well, but he left a lasting impression on me. I'm so glad that he spent his last few days with us. Maybe the purpose of his final assignment was to not only give us the message "let go of fear", but also, to use his words, "have the courage to not hide behind our symptoms". Symptoms are very real, but we are very strong, and we have the choice to step forward, sometimes shaking in our boots, and say "Symptoms? So what? I'll do it anyway."

Now, if you're like me, there will be times when you'll have a little trouble taking this courageous step forward, so I have a suggestion for you: Ask Chuck's spirit to give you a little kick in the pants.

Thanks Chuck.

Policy on Recovery Tune-up

June 26, 2003

Attached you will find a copy of the Recovery Tune-up. We use this as a way to help us keep on track in our role as a Peer Support staff person. The role of Peer Support requires a lot of diligence to make sure we stay in the zone of being mutual, not telling people what to do, while at the same time understanding that you are role models, and that people are looking up to you. So, the hard part is operating on two levels at once: Being mutual, yet always striving to help the other person recover; Being present, but always aware that you are serving as a role model. Because this is such an important multi-level role, the recovery tune up was designed to help you examine your actions and attitudes on a regular basis and make sure you're in the "zone".

The second part of the Recovery Tune-up is a list of questions to ask yourself that I hope will help you think through various situations and come up with ways of handling things that are mutual while at the same time stepping acknowledging the importance of being a role-model. We can add more questions to this section as things come up, so feel free to make suggestions, additions or deletions to the list. I will be meeting with you periodically for a "Tune-up" and this will give us an opportunity to expand this section as needed.

Thanks for all your great work, and for the wonderful way you are changing the world.

RECOVERY TUNE UP, Part I

Remember who you are and what you have to offer:

We each have a unique gift, and purpose for being. Our mission is to learn from the experiences we have had, and use what we have learned to promote recovery in others.

- ⌘ Know yourself, so you can stay out of your own way.
- ⌘ Share your story of recovery and hope in a way that inspires others to recover.
- ⌘ Keep asking for feedback from those you trust.

Remember the principles of Peer Support:

We have learned ways of promoting recovery in others and we are committed to learning even more ways of brining forward recovery for them.

- ⌘ Peer Support is having a cup of tea with someone, but it is never about the tea.
- ⌘ We use language that promotes recovery, avoiding labels, and locking people into the past, and learned helplessness and hopelessness.
- ⌘ We use active listening skills.
- ⌘ We remember the principles of “mutuality”. Our position as a Peer is more powerful and effective than any other role.
- ⌘ We do not abuse our power.
- ⌘ We identify options and opportunities without telling people what to do.
- ⌘ We leap at every opportunity to acknowledge a person’s strengths and worth.
- ⌘ We promote self-esteem and self-efficacy, and share tolls for self-management.
- ⌘ We provide information of resources and show people how to use them.
- ⌘ We encourage personal responsibility, constantly giving power back to the person.
- ⌘ We encourage self-advocacy, reminding people that they are not a “case” to be “managed”...”I am NOT their patient, they are MY team.”
- ⌘ We see people as “new” each moment, and allow them to grow into all they can be (avoid reinventing the past).
- ⌘ We gently encourage people to “stretch” and move out of their comfort zone.
- ⌘ We do not give up on anyone who is trying to recover.

Remember your commitment to yourself and your peers:

Once you step into the role of a Peer Support Specialist, you have the challenging task of remaining mutual, yet serving as a role model. This requires a great deal of integrity, courage, and honor.

- ⌘ We always work within the mission and vision of META Services.
- ⌘ We try not to fall down. If we do, we get back up as soon as we can.
- ⌘ We keep our word about being on time, and being present.
- ⌘ We ask for help when we need it.
- ⌘ We admit when we have made a mistake.

RECOVERY TUNE UP, Part II

Questions to Ask Yourself

What is the Peer Support role in a clinical staffing?

What to do when a person:

- 1) asks for help in areas that exceed the comfort level of the peer.
- 2) tells a peer that they are contemplating suicide.
- 3) tells a peer that they don't trust and can't work with their clinical team.
- 4) tells the peer that they are going to stop taking their medication.
- 5) tells a peer that they want to become a Peer Support Specialist.
- 6) asks a peer to become one of their supporters in their WRAP.
- 7) talks negatively to a peer about other peers.
- 8) asks a peer if they can borrow money from them.
- 9) asks a peer what they think they should do.
- 10) offers a peer a gift.
- 11) tells a peer about current abusive situations in their life; sexual, physical, spiritual, etc...
- 12) seems to be "not being real" with their peer supporter.
- 13) is abusive and inconsiderate of the peer.
- 14) seems to "idolize" the peer.
- 15) keeps wanting more from the peer than the peer is comfortable giving.
- 16) asks for a different peer supporter because they are not satisfied with the peer they have.
- 17) is attracted to a peer and suggests a more intimate relationship.
- 18) has a poor clinical team and the peer feels a need to intervene.

What to do when the peer is attracted to a person they are peer supporting and feels like having a more intimate relationship with them.

August 12, 2002

Policy letter: *If we must have enemies, let's try to learn from them.*

When we have difficulties and disagreements with others (or systems), our minds often go to work "building a case" against them, and before we know it, we've formed an unfavorable opinion about them, sometimes based on very little evidence or information. Then, every time we see them, we see them through the lenses of our unfavorable opinion. I hate to admit it, but I've even caught myself forming negative opinions about people, just because they reminded me of someone else that I didn't "hit it off" with.

Since this human tendency to "recognize the enemy" can create significant roadblocks in our ability to make friends and develop support systems, I thought we should talk about it.

So how do we move beyond this tendency? A famous quote from Abe Lincoln goes something like this: "The fastest way to get rid of an enemy is to turn them into a friend." Pretty good advice, huh? Another piece of advice comes from Dr. Carl Jung in his writings about our "shadow self". He suggests that if we see characteristics in others that we don't like, it's probably because we have similar characteristics ourselves. When I first read this I screamed "NO! NO! This cannot be true. You really goofed this time Dr. Jung!!! I'm not like that!!" Then I started noticing, and every now and then I'd catch myself acting very much like the person I was being critical of. Believe me, this was AWFUL, but once I owned up to it, I was able to clean up my own act, and to also see the other person in a whole new light.

I don't know who should be credited with this next concept, but it's just too good to leave out. I heard it on a TV documentary about, of all things, boxing. The story featured the relationship between Mohammed Ali and Joe Frazier, who for most of their careers, were arch enemies. They couldn't even sit through a brief press conference without getting so mad at each other that they'd start a fistfight. Later in life, they became good friends, and strongly supported each other. In a conversation about their relationship, they agreed that enemies either bring out the best in you, or the worst in you, and it's your choice as to what's brought out.

An enemy can bring out the best in us by challenging us to do better than we ever thought possible – push us to a level of performance beyond our wildest dreams. They can give us opportunities to take the high road, rising above the problem level. They can show us characteristics that we ourselves need to work on. Maybe we should thank them for helping us learn more about ourselves?

You've heard the term "he's his own worst enemy"? Now there's a thought to ponder!! Let me know what you think of this concept.

Lori

Some of you have asked me for information about “boundary” issues. I’ve never really understood why we use the word “boundary”. What we’re referring to is: “Working out a respectful way to be together”. Once we started talking about recovery and trying to practice and promote it, the whole issue of boundaries came up right away, because in many cases traditional “boundaries” made it impossible to have a REAL working partnership with the people that needed our help. In fact, when we began to look at the “boundaries” that had been erected, supposedly to protect the person, it sometimes looked more like “care givers” were hiding behind them to protect themselves.

The advent of Peer Support really brought the boundary thing front and center. Peers hug each other if they want to, they give each other rides, socialize together, and share their problems on a mutual basis. All these things have been, and still are, “off Limits” in many organizations, and to many disciplines. So once again, Peers are on the frontier of discovering real ways to set limits, and will probably be able to teach the rest of the system how to do this in a real way, without resorting to artificial and inauthentic “rules”.

So, let’s look at how to do this. First of all, there are some definite absolutes: If you are employed as a Peer, you have an obligation to provide a service to people in a way that is mutual, and at the same time you are responsible for offering help in a way that will do no harm. So while you are in Peer Support role, you absolutely should not have intimate relationships with people you are serving, or borrow money from them, or use your “helping role” to take advantage of them in any way. As Dr. Martinez said in his graduation speech to us “Be careful not to abuse the power you’ve been given.”

Here are some general guidelines you can follow if you are trying to decide what to do:

1. Is it consistent with my job description?
2. Is it in line with META’s mission and value statement?
3. Does the other person want this?
4. Do I feel OK doing it?

The first three are pretty easy, and the fourth one is OK, until we get to “What if I DON’T feel OK doing it?” Here’s where all the stress of feeling guilty if you say “No” comes in. This is usually related to someone asking us for something we don’t feel comfortable giving. So here’s some “tips” that I hope will help you deal with this constructively.

If you don’t feel comfortable saying yes, just say “no”, and say it in a professional and caring way. Remember, you don’t necessarily have to offer a reason, other than “I’m just not comfortable saying “yes” to that. It’s always OK to say, “I don’t know”. If you do feel compelled to explain, remember, it doesn’t have to make sense to anyone but you. You can agree with all the reasons someone thinks you should do something, and still not do it. Once you’ve been clear about what your limits are, you don’t need to keep explaining. Move on to other conversations.

The reason this could be more intense in Peer Support is, first of all, we’re figuring all this out as we go along, so we don’t have any traditional answers to take off the shelf (this is a good thing). Secondly, people haven’t been offered these services before, so they don’t know where the line is either. They are trying to figure this out too, by asking you what you can and can’t do for them.

Remember this: If we all said “yes’ to EVERYTHING, we’d all be so worn out we wouldn’t be able to do ANYTHING very well. So save yourself for the places where you can make the most difference.

And finally, remember not to do things for people that they could do for themselves. Focus your energy instead on supporting and inspiring them to take personal responsibility for the things they can do themselves.

So give these things a try, and let me know how it goes.

Lori
xoxo

Policy Letter: *When Someone Needs A Little More Support* May 27, 2003

I'm writing to give you a little more guidance for those times when a person in one of your classes may need a little more support. It's rare that a person in one of our classes needs additional support, but occasionally this has been the case. So how do we handle this? It's a little more complicated than you might think, and here are some of the reasons.

In every class, there is a trust agreement that the class agrees to at each session. This agreement almost always includes a statement about confidentiality that sounds like this "What is spoken here stays here." So if someone needs extra help, how do we honor the trust agreement and still bring in more help? Well, here are some steps you can take to bring in extra support without violating the trust agreement:

- Ask the person if they would be willing to talk to someone on their clinical team. Since most of the classes are held at clinic sites, members of the person's clinical team should be easily accessible and can quickly lend a hand. If not, ask for the "dot person" at the site.
- If the person is reluctant to receive additional support, ask them if you can help make the connection for them – make a phone call, call a case manager, go with them and support them during the process.
- Ask if the person has a friend or family member that can be brought in to help.
- If the person is not willing to receive more support, ask them if you can share the information with their clinical team.

I'm sure you can approach these situations skillfully and successfully support people in getting further assistance from their clinical team without disregard of the trust agreement. However, in the rare case where the person does not want you to share the conversation with the clinical team, you need to make a carefully considered decision about whether it is serious enough to share the information anyway. Here are some guidelines to help you make this decision:

- Is the person talking seriously about doing harm to themselves?
- Is the person talking seriously about hurting another person?

If the answer to either of these questions is "Yes", then it's time to get further direction from your team leader immediately, who will involve others, as appropriate.

This might be a good time to remember that you are a **Peer Support**, not a junior case manager, or a clinical advisor. Your role is to operate from a place of mutuality and support, sharing the parts of your own personal experience that will instill hope and bring forward the person's strengths. Support the person in finding their own solutions, and don't try to fix things for them. Remind them that they've solved lots of other problems in the past. Ask them what they can do to help someone else.

Thanks for your commitment to supporting others in the recovery process. And thanks for doing it in a way that is respectful, truthful, and honors each person's individuality.

Lori
xoxo

Policy Letter: Reporting Incidents

June 12, 2003

As you probably know, most companies have a process for reporting serious situations that occur during the course of work. META has one, too. It's pretty long, and I dare say, intimidating. So I thought it would help if I summarized the parts that pertain to REC in a more reader-friendly format for you. Feel free to read the long and intimidating one if you want. Otherwise, please make sure you understand this summary and know how to fill out the attached form.

I guess the first question is "What is an incident?" Here's a list of situations that may come up in REC that constitute an incident and require the completion of the form:

- A. Death
- B. Suicide
- C. Self abuse requiring outside medical intervention.
- D. Homicide
- E. Physical abuse/allegation
- F. Sexual abuse/allegation
- G. Incident that may seem high-profile in nature
- H. Significant staff injury

There's another list of incidents that have to do with people's rights being violated that you may encounter that includes neglect, exploitation, unreasonable use of force, and mental/verbal abuse.

So, what do you do if you have an "incident"?

1. Report it immediately to your team leader or Administrator.
2. Obtain a copy of the attached form (probably from Daniel) and fill out the parts indicated (see attached example). You won't know the answers to all the questions, so just leave them blank until we can get some consultation from the QA Department.
3. Turn it in to your team leader or Administrator. They will then send it on to META's quality management department for further processing.

Some incidents will require an investigation, so if this happens, please give the person investigating your full cooperation and help them in any way you can to get an accurate understanding of the event.

So there you have it! These things won't come up very often, so you won't get a lot of practice and will probably forget how to do this in the mean time. Therefore, I suggest you keep this policy summary some place that you'll remember it, so you can refer to it if you need to.

Thanks a lot for your attention to this matter, and thanks for your cooperation in following the policy.

Lori

January 25, 2003

Policy Letter: Resolving Disagreements with Each Other, Part I

Hello,

I've already spoken to many of you about this issue, but thought I should make sure everyone in REC gets this information. Let's start by remembering the META mission and vision statement:

"To create opportunities and environments that empower people to recover from the effects of psychiatric symptoms and addictions, succeed in accomplishing their goals, and reconnect with themselves, others, and to meaning and purpose in life."

A mission statement is a very important part of an organization's business, because it provides guiding principles that all decisions are made in accordance with. Maintaining a "recovery environment" is a critical part of META's business, because it's the "glue" that helps people stay in recovery. It is very important that we are all very protective of our recovery environment here at META, and do everything we can to maintain it. We can not afford to become complacent about this, or we risk compromising it, or losing it all together. We know we have it -- it's the reason that strangers walk in the door and say "what's different here? It feels really good to be here." It's why people come and just hang around without even knowing why.

Research continues to show that having a "recovery environment" is a powerful predictor of recovery. As you can tell by now, I am very passionate about this issue, and I hope we can all be committed to continually working on it. The biggest threat of damaging our environment the most is disputes that arise between us. So we need to be extra careful about how we handle disputes when they arise among us. Here's how I'd like you to manage these situations:

First of all, see if you can talk it out between you -- maybe it's a simple misunderstanding that can easily be resolved if we just take time to honestly listen to each other.

If listening to each other doesn't resolve the issue, drop it for the moment and agree to come to one of the "bosses" and get some help with it. Believe me, we will put allot of effort into helping you, because we know how important it is to protect our environment.

By all means, **DO NOT GET IN A DISPUTE AT YOUR ValueOptions WORK SITE.** When you do this, you cause the staff and our customers to loose confidence in you, and you set the whole program, and peer movement, back several notches.

Unless you really believe you are in a life-threatening situation, **DO NOT CALL IN THE POLICE!!** When you do this, you are "copping out" and not taking responsibility for resolving the problem. You are instead creating more problems for everyone concerned. It is also indicating that you are not capable of resolving the issues, and I know that this is not true!!! Instead of the police, call for the help of another team member or supervisor.

If you see a "dispute in process" between other team members, don't ignore it. Offer to help. Ask if you can support them in resolving the dispute. If necessary, alert a supervisor.

Participating in negative conversations or gossip is another activity that is poisonous to the

environment, and it is not an honest approach to solving problems. Please make every effort to resist the temptation to do this. When you have to "clear the air" do so with your supervisor in private.

I hope I haven't sounded "crabby" in delivering this message. I don't feel "crabby", but I do feel passionate about it. If anyone has any questions, please do not hesitate to ask me for further information. I truly appreciate your help with this, because it will take all of us making this commitment together to protect one of our greatest and most effective assets -- our RECOVERY ENVIRONMENT.

Thanks to all of you for your cooperation and support,

Lori
xoxo

June 25, 2003

Policy Letter: Resolving Disagreements with Each Other, Part II

Most organizations have some basic guidelines that describe how they will handle “people problems” -- things people do at work that need correcting or improving. Generally, these guidelines cover three areas – **attendance, behavior, and performance**. Let’s take a close look at some of the situations in each area that could lead to a need to correct or improve our performance.

Attendance. This is an important area for obvious reasons -- if you don’t show up for work, the work doesn’t get done. Here are four situations to avoid in the area of attendance:

1. Taking time off work without asking about it first.
2. Lots of absences.
3. Arriving late and leaving early.
4. Taking extended breaks and lunch periods.

Behavior. This is spelled out rather thoroughly in part one of this policy letter, so here’s a quick summary of things that will lead to a need for correction or improvement:

1. Behaving in ways that are harmful to our recovery environment.
2. Not following through on work assignments.
3. Behaving in ways that discredit you and the organization.
4. Activities that are illegal.
5. Falsifying events or records.
6. Discourteous treatment of the public, clients, or other employees.
7. Behaving in ways that is discriminatory towards others for any reason.
8. Sexual harassment.

Performance: This area is also addressed in part one of this policy, but here’s a quick review:

1. Not doing work assignments in a complete or effective manner.
2. Not showing any improvement on poor work performance.
3. Unauthorized release of confidential information.

Types and Progression of Corrective Steps: Keep in mind, the idea here is to help you continually improve your performance. So when you get feedback that you need to correct or improve your way of being, just do the best you can to make the necessary changes as quickly as possible.

1. **Verbal “heads up”.** Your supervisor will discuss the problem with you and will give you details on what the problem is and what you need to do to change it. Often you will be given a certain amount of time to make the improvements..

2. **Written “heads up”.** If, after several verbal notifications you do not make the requested changes, your supervisor will have no choice but to give you a written description of the problems, what you need to do to change, and a period of time to make the changes. This written notice will go into your personnel file.

3. **Pay Reduction.** Yes, this can happen if you are not improving your performance. If you fail to make improvements, your pay can be reduced. This is a serious step, and the decision to do this is made by the President/CEO. You'll get a written notice of this and a copy will go into your personnel file.

4. **Disciplinary Demotions.** Under circumstances of demotion for disciplinary reasons, you may be reassigned to a job with fewer responsibilities.

5. **Suspension.** If there is need for immediate action you may be suspended from work with or without pay for a specified period of time by the President/CEO.

6. **Discharge.** Employees should be aware that their employment relationship with META Services is based on the condition of mutual consent to continue the relationship between the employee and the agency. Therefore, the employee or the agency is free to terminate the employment relationship at will, with or without cause, and at any time. Recommendations to discharge an employee are to be made to, and authorized by the President/CEO.

Considerations: Supervisory and management personnel should be guided in their consideration of corrective matters by the following illustrative, but not exclusive, conditions.

1. The degree of severity of the offense.
2. The number, nature, and circumstances of similar past offenses.
3. Employee's length of service.
4. Provocation, if any, contributing to the offense.
5. Previous warnings related to the offense.
6. Consistency of penalty application.
7. Equity and relationship of penalty to offense.

Disciplinary notices to regular employees should, as a general rule, contain the following information:

1. A statement of the disciplinary action to be taken and its effective date.
2. A statement of the reason(s) for imposing the discipline and the nature of the violation.
3. Attachment of any supporting material or evidence where appropriate.

Service of disciplinary notice will be deemed to have been made upon personal presentation, or by depositing the notice, postage prepaid, in the U.S. mail, addressed to the employee's last known address on file.

Administrative Review (Grievance) Policy. It is the policy of META Services to treat employees in a fair and impartial manner. META Services is firmly committed to the belief that undisclosed problems will remain unresolved and eventually lead to further problems. So if you are experiencing serious aggravation at work and have not been able to resolve it in the manner spelled out in part one of this policy, there is one last step to take to reach a resolution, and you will not be subjected to discrimination or retaliation, or be penalized in any way for using this

process. If you feel like you need to use this process, contact the Human Resources Dept for further assistance.

The prescribed sequence. Consequently, the following exceptions are instances where an employee may bypass steps to seek resolution of a situation by the next higher authority.

1. If the complaint or problem involves a known or suspected violation by law;
2. If the complaint or problem is clearly not within the authority of the employee's superior to resolve;
3. If the employee and superior mutually agree to bypass the superior's steps;
4. If the nature of the complaint, problem, or dispute involves or has been caused by the employee's superior, and the employee has reason to believe the superior may be less than impartial.

May 14, 2003

Policy letter: *Releasing Information*

Hello,

We have had a new opportunity to learn some important lessons from one of our mistakes. This is a mistake that any of us would of made, so I'm glad it came up so we can keep from making it again.

Here's what happened:

A man came into our office asking to talk to one of our employees. He claimed to be related to her, so we told him where she was working. He then went to her work site and began to cause problems for her. She has now had to ask for police protection from this person and his associates. So you can see, we were trying to be friendly and helpful, but in this case it caused problems.

I've been thinking about how we should handle this in the future. We DO want to be friendly and helpful, but at the same time we want to protect each other from what could be troublesome from outsiders. So here's how I'd like us to handle this:

1. If someone we don't know asks us for information on each other, we take their name and number, and say we'll tell the person that they are trying to reach them.
2. We immediately try to reach the person. This is important because it may be an emergency.
3. We let the person know that someone is trying to contact them, and give them the name and number of the individual. It's then their decision to make contact with the outside individual.

I know you already know this, but since we're on the subject, I'll just remind you that we never give out information on any of the folks who use our services unless we have a signed release of information from them.

So that's it! Thanks for all the good work you all do, and let's keep learning!!

Lori
Xoxo

June 13, 2003

Policy Letter: *Socializing Opportunities*

As you know, we have discovered the therapeutic value of playing and having fun. This takes place on a regular basis in the WELL program, and to some degree in all other programs. We started doing this in the WELL program over a year ago as a way of building relationships with people and creating interest in attending recovery classes. It's been wonderful to see so many people laugh and play for the first time in a long time. Participating in activities seems to help people reconnect to themselves, their peers, and the community.

Because our goal is to create inclusion and an atmosphere of mutuality, we minimize the information we collect from participants, asking for only the information we will need to access in the event of an emergency. Rather than have each person fill out a lengthy release form, we provide a simple sign-in sheet and ask the person to identify a person we can contact in the event of an emergency. This can be their case manager, friend, or family member. We believe people can judge for themselves whether a particular activity is safe for them and we generally emphasize personal responsibility. We do remind people about proper sun protection, how to recognize signs of heat stroke, etc. Should a medical emergency arise, we utilize the public 911 system for help.

In the context of social events, it's not unusual for people to benefit from individual attention, such as a one-to-one peer support opportunity. When this is done, be sure and explain clearly in your note why this was helpful – following the guidelines for documentation.

August 3, 2002

Policy Letter: *Taking New Ground*

This policy letter is about taking responsibility for moving into new areas of personal growth and development. I decided to write to you about this topic after having conversations with a couple of peers lately who described a "growth moment" they'd recently experienced. I was very impressed by their ability to consciously recognize this "moment" as the beginning of a change in habit for them. Now, I can remember having a few of these "moments" myself over the years, but I usually wasn't able to recognize them at the time. The key element in this "moment" has to do with something we talk a lot about --CHOICE -- and choosing a new way to react rather than automatically falling into old habit patterns.

The Peers I talked to about this are seriously engaged in their recovery process. The "moment" they describe is the moment that immediately precedes a symptom. They describe the triggers and/or early warning signs, and just before surrendering to the symptom, they experience an unfamiliar "moment". If we were to ask them how they were feeling at that moment, they would probably say something like "I don't know....I've never been here before." Before these folks were engaged in their recovery process, they weren't able to stay in that moment long enough to recognize that they could probably choose to not fall into the symptom in the same old way.

In my own experience, I have had times when I haven't been able to stay in that moment, and have found myself so overwhelmed by the symptom that I didn't have any choice but to surrender to it. When I have been able to stay in the moment, I've been able to choose other options that have helped me grow and learn new ways of handling my feelings. The great thing about personal growth is that it makes you feel really strong -- I love that feeling.

There is something seductive about symptoms -- they are familiar ground, they give definition to who we are and what we're experiencing, and they usually cause others to either excuse us, or try to help us. So when we don't go into them, we're on new ground -- unfamiliar, undefined, and while it feels unreal, in fact, it is what's really real.

So next time you feel a symptom coming on, hold your ground, stay in that "moment" -- that unfamiliar, undefined space as long as you can. The longer you stay in that space, the more your true self will emerge. The way you'll know that you're in that space is that you won't feel anything. Just stay there. Something BIG is happening, even though you can't feel it. You may feel very alone, so just try and remind yourself that when you're in that "Moment" you are connected to all of the rest of us who've stood in that moment too, and we are sending you love and hope. You will emerge stronger and more yourself than ever before.

Choose to recover,

Lori
xoxo

Many of you missed the graduation ceremony last week, so you missed the wonderful comments Lisa made to the group. I want to quote them here so you can all have the benefit of remembering them:

“As you begin the newest part of your life today, remember this: All that you need to be is already inside of you. META did not cause you to become something new; it helped you find the treasure that was already inside you... Like the seed that holds the promise of a beautiful blooming flower, you held the wonder that you see in yourself today, all the time. It’s your time to bloom and grow and unfold into the glorious person you were always meant to be. People encouraged and supported you, but only you took the step and made the choice to recover.”

Now that’s worth remembering! It reminds me of how cluttered up we can become when we keep adding things to ourselves, to our stories, and to our lives when we forget that we’re already “good enough” with nothing added. In fact, the less additives the better!! But we get scared and start adding layers of “stuff” to hide behind, or to protect ourselves, then the next thing we know no one can find the real “us”. Sometimes WE can’t even find our own true self anymore because we’ve buried it so deeply.

The stuff we choose to hide behind is often boring and degrading. It’s often a strange assortment of worn out symptoms, excuses, apologies, and stories about why we are the way we are. We do all this partly to be “good enough”, but ironically, the outcome is that we cover up the fact that we already ARE “good enough”. No one, not even us, can figure this out anymore because of the clutter. As I’ve watched people (including watching myself), I find that as we recover, we have less and less stuff hanging around and are more able to let our true self shine through. Maybe we should call this the process of “un-discovery” instead of “re-discovery”??

Let’s all look at the stuff we still have hanging around – the stuff we clutter ourselves up with -- and clean up. We could get together and have a giant yard sale and get rid of all our stuff at once! Whew! That would be refreshing! The point is, you are all so beautiful and wonderful just as you are, and it’s truly an honor to work with you all.

Lori
xoxo