



EXPLORATION OF PEER-RUN AND PEER-INVOLVED ORGANIZATIONS IN TEXAS

REPORT / MHR

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# Recovery Community Organizations:

## An Exploration of Organizational Function and Capacity

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# Executive Summary

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- **Background:** Peer-run and peer-involved organizations provide non-clinical, supportive services for people in recovery from a mental health challenge or substance use disorder (or peers) and usually offer peers an opportunity to be directly involved in organizational function, management, or governance. Recovery Community Organizations (RCOs) are operated and governed by people in recovery from a substance abuse issue, and typically deliver public education, engage in public policy advocacy, and provide peer based recovery support services (e.g., peer support, assistance with resources, and socialization).
- **Purpose:** This project explores the strengths and needs related to organizational function and capacity for three RCOs in Texas. Organizational function refers to the structures and practices that are used to carry out organizational operations and include the domains of organizational development, mission, and purpose; management; and governance and leadership. Organizational capacity refers to the resources and abilities that organizations use to develop, sustain, and improve operations and include resources, knowledge, and skills; and adaptability and sustainability.
- **Method:** To examine the strengths and needs related to organizational function and capacity for RCOs in Texas, researchers at the Texas Institute for Excellence in Mental Health (TIEMH) conducted an online survey with the executive director of three RCOs in Texas. The online survey contained over 32 questions that yielded an overview of the function and capacity of RCOs. These data were analyzed and the results were organized by the five domains described above.
- **Results:** The RCOs that participated in this project reported many function and capacity strengths. RCOs in Texas have written mission and vision statements, offer a variety of services and activities to support members' recovery, have job descriptions for staff and volunteers, have boards of directors that meet regularly, provide training to new and tenured staff and volunteers, exhibit diverse funding sources, have written strategic plans, have strategic partnerships and alliances, and engage in community outreach.
- **Recommendations for Organizations:** The results of this study also suggest some areas for development, resources permitting. TIEMH therefore makes the following recommendations for RCOs in Texas: prioritize staff benefits, regularly review a strategic plan, and develop written goals and objectives.
- **Recommendations for HHSC:** TIEMH makes the following recommendations to HHSC regarding RCOs: support the development of RCOs throughout the state, support training and technical assistance for RCOs, and invest resources in collecting, analyzing, and reporting on RCO member outcomes.

# Introduction and Background

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## Peer-Run and Peer-Involved Organizations

### Peer-Run and Peer-Involved Organizations: An Overview

Peer-run and peer-involved organizations provide non-clinical, supportive services for people in recovery from a mental health challenge or substance use disorder (referred to hereafter as peers; Clubhouse International, 2018a; McKay, Nugent, Johnsen, Eaton & Lidz, 2018; Substance Abuse and Mental Health Services Administration [SAMHSA], 2011; Tanenbaum, 2012; Valentine, White, & Taylor, 2007; White, Kelly, & Roth, 2012). These organizations usually offer peers the opportunity to be directly involved in organizational function, management, or governance. For the purpose of this project, a distinction was made between peer-run and peer-involved organizations. Peer-run organizations typically require that a majority of the board of directors identify as peers, are run by peer staff, and provide opportunities for peers to become paid staff. This project explored two types of peer-run organizations: Consumer-Operated Service Providers (COSPs) and Recovery Community Organizations (RCOs). Peer-involved organizations typically do not require that a certain percentage of the board of directors identify as peers and non-peer staff typically run these organizations. However, peers are usually involved in organizational function. This project explored one type of peer-involved organization: Clubhouses. This report presents the results for RCOs.

### Recovery Community Organizations

RCOs are independent, nonprofit organizations that are managed and governed by representatives of the local recovery community (Ashford, Curtis, & Brown, 2018; Faces & Voices, 2012; Valentine et al., 2007; White et al., 2012). The recovery community is broadly described as the people in long-term recovery from substance addiction, their families and friends, allies, and recovery-focused addiction professionals (Valentine et al., 2007). Key organizational characteristics of RCOs include: 1) the majority of the board of directors, staff, volunteers, and membership are people from the recovery community (Valentine et al., 2007); 2) members are involved in organizational processes impacting programming and policy decisions (Faces & Voices, 2012); and 3) RCOs provide opportunities for members to volunteer and potentially become paid employees (SAMHSA, 2017).

RCOs follow three primary principles: 1) improve the number and quality of supports available to people seeking long-term recovery from substance addiction; 2) represent the voice, or interests, of the communities of recovery; and 3) operate as independent entities, accountable first to the communities of recovery which they represent (Faces & Voices, 2012; Valentine et al., 2007). RCOs engage in three central activities: public education, public policy advocacy, and the provision of peer-based recovery support services (Valentine et al., 2007). Recovery support includes a range of services that contribute to a peer's recovery process (SAMHSA, 2009). RCOs may offer services such as peer support, housing assistance, transportation, vocational training, employment services, support groups, systems navigation, recovery resource assistance, life skills training, and sober social activities (SAMHSA, 2009; Valentine et al., 2007; White et al., 2012). Members who receive support from RCOs may experience positive outcomes, including increased periods of abstinence (Armitage, Lyons, & Moore, 2010; Kamon & Turner, 2013), decreases in

hospitalizations (Bassuk, Hanson, Greene, Richard, & Laudet, 2016; Kamon & Turner, 2013), and improvements in domains of recovery capital, which include assets that support a person's recovery (Kamon & Turner, 2013).

## Organizational Function and Capacity

Organizations employ elements of organizational function and capacity to operate effectively. Organizational functions are the *structures and practices* that an organization uses to carry out operations (Armstrong, 2006). Organizational capacities are the *resources and abilities* that an organization uses to develop, sustain, and improve operations (Evans, Raymond, & Perkins, 2015; Schuh & Leviton, 2006; Williams-Gray, 2016).

TIEMH researchers conducted a literature review to 1) identify specific elements of organizational function and capacity, and 2) develop a framework to structure these elements. The extant literature includes multiple frameworks and assessment tools for evaluating organizational capacity and performance. Drawing from existing frameworks and assessment tools, TIEMH researchers identified key elements of organizational function and capacity and organized these elements into five domains. Three domains of organizational function were identified: 1) Organizational Development, Mission, and Purpose; 2) Operational Management; and 3) Governance and Leadership. Two domains of organizational capacity were identified: 1) Operational Resources, Knowledge, and Skills; and 2) Adaptability and Sustainability.

### Domains and Elements of Organizational Function

This section provides brief descriptions of each of the five domains of the Organizational Function and Capacity Framework used for this project, as well as the elements within each domain. See the methods section for detailed descriptions of the specific domain elements, and the measures used to operationalize the elements, included in this report.

#### *Organizational Development, Mission, and Purpose*

Organizational Development, Mission, and Purpose provide information about an organization's developmental history as well as what an organization intends to accomplish with its work. Elements of this domain include organizational development, organizational mission and vision, and organizational purpose (Lusthaus, Adrien, Anderson, Carden, & Montalvan, 2002; McKinsey & Company, 2001; Paynter & Berner, 2014).

#### *Operational Management*

Operational Management refers to the people, processes, policies, and procedures involved in day-to-day operations (Schuh & Leviton, 2006; Lusthaus et al., 2002). Elements of this domain include the program of services and activities, members and membership management, staff and staffing management, financial management, operational policies and procedures, and member involvement in organizational function.

### *Governance and Leadership*

Governance and Leadership refer to the people involved in making decisions about the organization (Williams-Gray, 2016), and their functions within the organization (Liket & Maas, 2015). Elements of this domain include the board of directors and the executive director.

### Domains and Elements of Organizational Capacity

#### *Operational Resources, Knowledge, and Skills*

Operational Resources, Knowledge, and Skills refer to the resources and abilities that support an organization's capability to implement key organizational functions (Connolly & York, 2003). Elements of this domain include staff development, program development, technology resources, legal and liability management, data management and reporting, funding and funding development, facilities, and training and technical assistance

#### *Adaptability and Sustainability*

Adaptability and Sustainability refer to the resources and abilities that support an organization's capability to connect with, demonstrate accountability to, and affect the broader context in which an organization exists (Connolly & York, 2003; Liket & Maas, 2015; McKinsey & Company, 2001; Snow, 2012). Elements of this domain include strategic planning, partnerships and alliances, community outreach, and advocacy.

## **Exploration of Organizational Function and Capacity of Peer-Run and Peer-Involved Organizations**

For the 2018-2019 fiscal year, the Texas Health and Human Services Commission (HHSC) contracted with the Texas Institute for Excellence in Mental Health (TIEMH) to describe the organizational functions and capacities of three types of peer-run and peer-involved organizations in Texas: Clubhouses, COSPs, and RCOs. This report presents the results for RCOs.

TIEMH conducted surveys with the directors of the three RCOs currently funded by HHSC. The purpose of this project is to describe: 1) elements of organizational function and capacity that RCOs employ, and 2) the strengths and needs of RCOs related to organizational function and capacity.

## **Project Design**

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### **Participating Organizations**

#### Recovery Community Organizations

HHSC provided the contact information for the directors of three RCOs in Texas that receive HHSC contract funding: the Association of Persons Affected by Addictions (APAA) in Dallas, the Center for Wellness and Recovery Resources in

Houston, and Communities for Recovery in Austin. An email describing the purpose of the project was sent to each director, along with a link to the online survey. All three directors completed the survey.

## Organizational Function and Capacity Framework

This section provides details about the elements and measures used to explore the three domains of organizational function and the two domains of organizational capacity. This framework does not present an exhaustive list of elements and measures for organizational function and capacity, but rather represents those best suited for the purposes of this project. The elements and measures listed below are included in this report. See Appendix A for a table listing the domains, elements, measures, and sources for the Organizational Function and Capacity Framework.

### Organizational Development and Mission

**Organizational Development** refers to the founding and evolution of an organization. The measure that operationalizes organizational development is the age of an organization (Lusthaus et al., 2002).

**Organizational Mission and Vision** refer to the organization's communication about its goals for the people who receive services and the community. The measures that operationalize this element include whether or not an organization has a mission statement and whether or not an organization has a vision statement. An organization's mission and vision statements communicate an organization's purpose and direction, and unify leadership, staff, and members (McKinsey & Company, 2001; Snow, 2012).

### Operational Management

**Program of Services and Activities** refer to the array of services and activities offered by an organization. The measures that operationalize programming include the number of sites at which services are offered and the types of services and activities an organization offers.

**Staff and Staffing Management** refer to staff characteristics, staff benefits, and staff job descriptions. The measures that operationalize this element include the number of staff and volunteers, whether or not an organization has job descriptions for staff and volunteers, and whether or not an organization offers benefits to paid staff. Job descriptions provide clarity for staff roles and a basis by which staff performance can be evaluated. Staff benefits may help improve staff retention (Snow, 2012).

**Operational Policies and Procedures** refer to the written policies and procedures an organization employs to guide organizational operations. Organizational policies help an organization achieve its organizational mission (Snow, 2012). The measures that operationalize this element include whether or not an organization has written policies and procedures, how frequently the written policies and procedures are reviewed, whether or not an organization has written bylaws, and whether or not an organization has a written code of ethics.

### Governance and Leadership

**The Board of Directors** should provide expertise, guidance, support, and oversight to assure sustainability, organizational effectiveness, and uphold the interests of all stakeholders (Liket & Maas, 2015; Lusthaus et al., 2002;

Paynter & Berner, 2014; Snow, 2012). The measures that operationalize this element include whether or not the organization has a board of directors, the frequency of board meetings, and whether or not meeting minutes are made available to the public.

#### Operational Resources, Knowledge, and Skills

**Staff and Volunteer Development** refer to activities that enhance the staff members' and volunteers' ability to perform their organizational role (Lusthaus et al., 2002). The measures that operationalize this element include whether or not new or tenured staff and volunteers received training.

**Technology Resources** refer to the assets that allow an organization to communicate and engage with stakeholders and the community (Brown, Andersson, & Suyeon, 2016; Liket & Maas, 2015). The measure that operationalizes this element identifies the technology resources an organization utilizes.

**Legal and Liability Management** refer to an organization's legal status as a nonprofit organization and the insurance coverage an organization maintains. The measures that operationalize this element identify whether or not an organization has 501(c)(3) nonprofit status, and whether or not an organization has insurance coverage.

**Data Reporting** refers to an organization's practice of collecting data for reporting purposes. Data collection and reporting supports the development of programming and helps organizations communicate with funders (Liket & Maas, 2015; Snow, 2012; Williams-Gray, 2016). The measure that operationalizes this element identifies whether or not an organization tracks data for reporting purposes.

**Funding** refers to an organization's current funding resources. Financial capacity may be key to organizational success, and organizational capacity building is often dependent on funding (Brown et al., 2016; Kapucu, Healy, & Arslan, 2011). The measures that operationalize this element identify an organization's budget and funding resources.

**Training and Technical Assistance** refer to areas in which the staff, leadership, or the governing body need development or support. The measure that operationalizes this element identifies training and technical assistance areas of need from a list of common organizational needs.

#### Adaptability and Sustainability

**Strategic Planning** identifies an organization's future endeavors. A strategic plan may help an organization achieve its mission (Snow, 2012). The measures that operationalize this element include whether or not an organization has a strategic plan, how frequently the strategic plan is reviewed, and whether or not an organization has written goals and objectives.

**Partnerships and Alliances** refer to the strategic relationships an organization has formed in the community to potentially enhance its function and capacity (Brown et al., 2016; Kapucu et al., 2011; Lusthaus et al., 2002; Snow, 2012). The measures that operationalize this element include whether or not an organization has partnerships and alliances and with what types of entities.

**Community Outreach** refers to the methods an organization employs to reach the broader public. These methods include direct (e.g., presentations or phone calls) or indirect (e.g., email or social media) methods. The measure that operationalizes this element identifies what types of community outreach methods an organization utilizes.

## Data Collection and Analysis

The survey tool consisted of 32 questions (see Appendix B). The surveys were administered through a secure online survey platform, Qualtrics, XM. The directors were sent an email invitation with a link to the survey. Upon clicking the survey link, the directors were presented with an introductory page that described the purpose, risks, voluntary nature of participation in the survey, and confidentiality. No signature was required for consent. The directors indicated consent upon clicking the “I agree to participate” button on the introductory page, and were then able to complete the survey. If the director clicked “I do not agree to participate,” they were redirected to a page that thanked them for their time and exited them from the survey.

Directors had the option to save their progress, and then return later to complete the survey during the administration period. The survey remained open for one month. A reminder email was sent halfway through the administration period. Upon completing the survey, the directors were offered the opportunity to review and change their responses before exiting the survey. Survey responses were encrypted, and no personally identifying information was stored with survey responses.

The survey data were exported to SPSS, Version 25, to conduct descriptive analyses. Frequency of responses and measures of central tendency are reported. Results from these analyses were organized into the domains of organizational function and capacity.

# Results

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## Organizational Development and Mission

### Organizational Development

Among the three RCOs that participated, the median age was 15 years (range 9-21 years). Table 1 lists the age of the three RCOs.

Table 1. Age of each of the RCOs.

Organization	Age
Association of Persons Affected by Addictions	21
Center for Recovery and Wellness Resources	9
Communities for Recovery	15

### Organizational Mission and Vision

All three of the RCOs (100%) reported that they have a written mission statement. All three organizations (100%) also reported that they have a written vision statement.

## Operational Management

### Program of Services and Activities

Among the three RCOs, all (100%) offer services at more than one location.

The three RCOs were asked to report the services and activities they offer. The most frequently provided services include assistance navigating health systems (n=3, 100%), life skills training (n=3, 100%), the opportunity to work or volunteer at the organization (n=3, 100%), one-on-one peer support (n=3, 100%), peer support groups (n=3, 100%), recovery education (n=3, 100%), Wellness Action Recovery Plan (WRAP; n=3, 100%), fitness and wellness classes (n=3, 100%), assistance with basic needs (n=3, 100%), bus passes or taxi vouchers (n=3, 100%), housing assistance (n=3, 100%), transportation using an organizational vehicle (n=3, 100%), social engagement and informal peer support (n=3, 100%), and social or recreational activities (n=3, 100%). Table 2 lists all of the services and activities the organizations offer.

Table 2. Services and activities offered by the RCOs.

<b>Service/Activity Offered</b>	<b><i>n</i></b>
<b>Advocacy and Self-Advocacy</b>	
Advocacy	3
Assistance navigating health systems	3
Life skills training	3
Member self-advocacy training	1
Peer leadership	1
<b>Education and Employment</b>	
Opportunity to work or volunteer at the organization	3
Computer/technology classes	2
Education/GED assistance	2
Vocational/employment assistance	2
Trainings (unspecified)	1
<b>Mental Wellness and Recovery</b>	
One-on-one peer support	3
Peer support groups	3
Recovery education	3
Wellness Action Recovery Planning (WRAP)	3
Crisis support	2
<b>Physical Wellness</b>	
Fitness/wellness classes	3
<b>Resource Needs</b>	
Assistance with basic needs	3
Bus passes or taxi vouchers	3
Housing assistance	3
Transportation using organization vehicle	3
Mental healthcare referrals	1
Traveling companion	1

Table 2. Services and activities offered by RCOs, continued.

Service/Activity Offered	<i>n</i>
<b>Social Connection</b>	
Social engagement/informal peer support	3
Social or recreational activities	3

### Staff and Staffing Management

The mean number of staff at the organizations is 21 (median 20; range 16-27). The mean number of volunteers is 37 (median 15; range 10-85). Table 3 lists the number of staff and volunteers at the three organizations.

Table 3. Number of paid staff and volunteers.

	APAA	Center for Recovery and Wellness Resources	Communities for Recovery
Paid staff	20	16	27
Volunteers	10	15	85

All three of the RCOs (100%) reported that they have written job descriptions for paid staff. All three of the RCOs (100%) reported they have written job descriptions for volunteer positions.

The RCOs were asked to describe the benefits offered to paid staff (see Table 4). Of the three RCOs, two organizations (67%) offer paid sick leave and paid vacations. One organization (33%) offers dental insurance and health insurance. One organization (33%) offers reimbursement for medical expenses.

Table 4. Benefits offered to paid staff.

Benefit Offered	<i>n</i>
Paid sick leave	2
Paid vacation	2
Dental	1
Health insurance	1
Reimbursement for medical expenses.	1

## Operational Policies and Procedures

All three RCOs (100%) reported that they have written policy and procedure documents. All three (100%) also have written bylaws and a written code of ethics. Two of the organizations (67%) reported that the written policies and procedures are reviewed quarterly. One organization (33%) reported that the written policies and procedures are reviewed twice annually.

## Governance and Leadership

All three of the RCOs (100%) reported having a board of directors. Two organizations (67%) reported that their board of directors meets quarterly, and one organization (33%) reported their organizational board meets twice annually. All organizations (100%) make the board meeting minutes available to the public.

## Operational Resources, Knowledge, and Skills

### Staff and Volunteer Development

All three organizations (100%) reported that new staff and volunteers receive training. All three organizations (100%) also provide ongoing training to tenured staff and volunteers.

### Technology Resources

The three RCOs utilize a variety of technology resources. The most common resources include computers (n=3, 100%), copiers or printers (n=3, 100%), email access, (n=3, 100%), internet access (n=3, 100%), tablets (n=3, 100%), and an organizational website (n=3, 100%). Table 5 lists the technology resources available to the organizations.

Table 5. Technology resources.

Technology resource	<i>n</i>
Computer	3
Copier/printer	3
Email access	3
Internet access	3
Tablet	3
Website	3
Cell phone	2
Fax machine	2
Social media access	2

## Legal and Liability Management

All three organizations (100%) reported that they have 501(c)(3) nonprofit organization status. All three organizations (100%) reported that they have insurance coverage.

## Data Reporting

All three RCOs (100%) reported that they track data for reporting purposes.

## Funding and Funding Development

The average of the annual budgets for the three organizations is \$1,316,667 (median \$1,500,000; range \$450,000-\$2,000,000).

The organizations reported a variety of funding sources (see Table 6). The most common funding sources reported include contracts with the local mental health authorities (n=3, 100%), grants (n=3, 100%), and the HHSC contract funding (n=3, 100%). Two organizations (67%) reported that they receive funding through donations, and two organizations (67%) receive funding through contracts with city or county governments.

*Table 6. Funding sources.*

<b>Funding source</b>	<b><i>n</i></b>
Contract with LMHA	3
Grants	3
Contract with HHSC	3
Donations	2
Contracts with local or city governments	2
Foundations	1
Other contracts	1
Revenue for services	1

## Training and Technical Assistance

The RCOs were asked to select training and technical assistance (TTA) needs that they felt would benefit their organizations (see Table 7). The most commonly reported needs include board development (n=3, 100%), building public awareness (n=3, 100%), fundraising (n=3, 100%), grant writing (n=3, 100%), personnel management (n=3, 100%), and supervision (n=3, 100%).

Table 7. Training and technical assistance needs.

Training and technical assistance need	<i>n</i>
Board development	3
Building public awareness	3
Fundraising	3
Grant writing	3
Personnel management	3
Supervision	3
Conflict resolution	2
Developing strategic partnerships	2
Fiscal management	2
Leadership development	2
Nonprofit management	2
Performance evaluation	2
Program development	2
Strategic planning	2
Use of computers	2

## Adaptability and Sustainability

### Strategic Planning

All three organizations (100%) have written strategic plans. One organization (33%) reported that the strategic plan is reviewed annually. One organization (33%) reported the plan is reviewed every two to four years. One organization (33%) reported that the strategic plan had never been reviewed. Two of the organizations (67%) reported that they have written goals and objectives.

### Partnerships and Alliances

Table 8 summarizes the types of organizations with which the RCOs maintain partnerships and alliances. The types of organizations most commonly reported are the local mental health authorities (n=2, 67%), the local recovery-oriented system of care (n=2, 67%), substance use treatment organizations (n=2, 67%), and community or drug treatment court (n=2, 67%).

Table 8. Partnerships and alliances.

Partnerships and alliances	<i>n</i>
Local mental health authority	2
Local Recovery Oriented System of Care	2
Substance use service provider or treatment center	2
Community/drug treatment court	2
Community-based nonprofit	1
Community services collaborative	1
Hospital	1
Housing services organization	1
Local law enforcement agency	1
Other recovery community organizations	1
Peer-based recovery organization	1
Sober living facilities	1
Sobering center	1
University or university program	1

### Community Outreach

The RCOs were asked to describe the methods they use to engage in community outreach. The most commonly utilized methods include fliers (n=3, 100%), organizational open houses (n=3, 100%), presentations (n=3, 100%), visits to businesses (n=3, 100%), and the organizational website (n=3, 100%; see Table 9).

Table 9. Community outreach.

Community Outreach Method	<i>n</i>
Fliers	3
Open houses	3
Presentations	3
Visit businesses	3
Website	3
Social media	2
Letters	1

# Discussion

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The purpose of this report was to explore the functions and capacities of RCOs in Texas. To do so, TIEMH conducted a survey of three RCOs. In this section, key findings related to functional and capacity strengths, and areas for improvement, are discussed.

## Organizational Function

### Organizational Development and Mission

The core elements of organizational function in the domain of Organizational Development and Mission include:

- Age of organization
- Written mission statement
- Written vision statement

The median age of the RCOs that participated in this project was 15 years. All three organizations (100%) have both written mission and vision statements. A mission statement helps to guide the overall function of an organization, clarify the organization's purpose, and unify the commitment of staff, leadership, and members (McKinsey & Company, 2001; Snow, 2012). Further, organizations with established missions may be more likely to actualize their social impact (McKinsey & Company, 2001).

### Operational Management

The core elements of organizational function in the Operational Management domain include:

- The program of activities and services
- Staff and staffing management policies (e.g., job descriptions, benefits, etc.)
- Operational policies and procedures

The three RCOs that participated in this project each offer a variety of services and activities to support people in their recovery. All three provide assistance navigating health systems, life skills training, opportunities to work or volunteer at the organization, one-on-one peer support, peer support groups, recovery education, Wellness Action Recovery Plan (WRAP), fitness and wellness classes, assistance with basic needs, bus passes or taxi vouchers, housing assistance, transportation using organizational vehicle, social engagement and informal peer support, and social or recreational activities. Providing a diverse array of activities and services is an important indicator of organizational function (Schuh & Leviton, 2006)

One strength of the RCOs is that 100% of the organizations in this project have job descriptions for paid and volunteer staff. Job descriptions are a functional element that help define job roles and skills needed to perform job duties (Schuh & Leviton, 2006; Snow, 2012).

All three RCOs (100%) have written policies and procedures addressing organizational operations, including bylaws and a code of ethics. The RCOs also indicated that these policies and procedures are frequently reviewed. Written policies and procedures may suggest structured programming, as well as provide clear guidance for organizational operations (Lusthaus et al., 2002; Paynter & Berner, 2014; Snow, 2012).

One area of potential development identified is benefits offered to paid staff. Two (67%) organizations offer paid leave (e.g., paid vacations and sick leave). One organization (33%) offers access to health and dental insurance, and one organization (33%) offers reimbursement for medical expenses. The organizations should explore ways to provide insurance, paid leave, and retirement plan options to paid staff. Staff benefits are important because they help to attract and retain qualified staff as well as improve overall productivity and job satisfaction (Snow, 2012). However, the ability to provide benefits to staff depends heavily on funding capacity and funding priorities.

## Governance and Leadership

The core element related to organizational function for the Governance and Leadership domain is:

- The board of directors

All of the RCOs that participated in the project (100%) have a board of directors that meet regularly. Additionally, all organizations make board meeting minutes available to the public. The regularity of the meetings suggests that the boards of directors are active, which is important for organizational function (Brown et al., 2016).

## Capacity Strengths and Needs

### Operational Resources, Knowledge, and Skills

The capacity elements related to Operational Resources, Knowledge, and Skills include:

- Staff development
- Technological resources
- Legal and liability management
- Funding
- Training and technical assistance needs

All of the RCOs (100%) offer training to new and tenured staff and volunteers. The availability of training is a capacity that can enhance program delivery. Further, training is an important capacity strength because it contributes to the ability of staff and volunteers to effectively do their jobs, which in turn contributes to the success of members

The RCOs utilize a variety of technology resources. All three (100%) utilize computers, copiers or printers, tablets, email, internet, and organizational websites. Technology resources, and in particular internet access, are important because they provide an avenue for stakeholders and the community to communicate with organizations (Liket & Maas, 2015) as well as allow organizations to access informational resources, people with knowledge and skills, and networking (Lusthaus et al., 2002).

In terms of legal and liability management, all three organizations (100%) have 501(c)(3) nonprofit status and carry organizational insurances. Status as a nonprofit organization, according to the literature, represents organizational accountability (Snow, 2012). Further, maintaining insurance protects an organization from potential liabilities.

The RCOs receive funding from diverse sources, most commonly contracts with the LMHAs, grants, and the contract with HHSC. Funding allows organizations to develop programming, build capacity in other areas, and sustain organizational operations (Brown et al., 2016; Kapucu et al., 2011).

The RCOs identified areas of training and technical assistance (TTA) needs. The most commonly reported needs include board development, building public awareness, fundraising, grant writing, personnel management, and supervision. It is important that organizations have access to a system for sharing knowledge, best practices, and technical expertise to enhance function (Snow, 2012).

### Adaptability and Sustainability

The capacity elements related to Adaptability and Sustainability include:

- Strategic planning
- Partnerships and alliances
- Community outreach

All three RCOs (100%) have a written strategic plan. Two RCOs (67%) review the strategic plan periodically. Two of the RCOs (67%) have written goals and objectives. The existence of a strategic plan, goals, and objectives may support an organization's ability to monitor, assess, and respond to internal and external changes (Connolly & York, 2003).

All three RCOs (100%) have alliances and partnerships with other organizations. The most common partnerships and alliances are with the LMHAs, the Recovery Oriented Systems of Care, and other addiction treatment entities. Partnerships and alliances help organizations support the people served and allow for the exchange of ideas and resources (Kapucu et al., 2011; Lusthaus et al., 2002).

All of the organizations (100%) engage in community outreach. The most common methods of community outreach include presentations, open houses, visits to businesses, fliers, and the use of an organizational website. Community outreach serves the dual purpose of providing transparency to the public and building relationships (Brown et al., 2016; Liket & Maas, 2015).

# Recommendations

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## Recommendations for Organizations

The RCOs that participated in this project reported several function and capacity strengths. All of the organizations have mission and vision statements, offer a variety of programming, provide training, have diverse funding sources, have a strategic plan, maintain strategic partnerships and alliances, and engage in community outreach. TIEMH recommends that the RCOs enhance the following areas of function and capacity.

- Explore prioritizing staff benefits
- If needed, review the strategic plan at least
- If needed, develop written goals and objectives
- Continue to develop additional funding sources
- Continue to identify and build strategic partnerships and alliances

## Recommendations for HHSC

Based on the findings of this study, TIEMH makes the following recommendations to the Texas Health and Human Services Commission (HHSC) regarding steps that can be taken to support RCOs in Texas:

- Support the development of additional RCOs in Texas
  - HHSC could collaborate with the Council on Accreditation of Peer Recovery Support Services to identify ways to establish additional RCOs in Texas, particularly in rural areas. Currently, the three RCOs funded through HHSC exist in major urban areas.
- Support Training and Technical Assistance opportunities for RCOs

## Recommendations for Future Research

Based on the findings of this study, as well as the existing literature on RCOs, TIEMH makes the following recommendations regarding areas of future research:

- Conduct more research to determine if and how members benefit from RCOs in Texas as well as to identify the mechanisms through which members may benefit.
- Conduct additional research to further explore the function and capacity of RCOs in Texas.

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## Appendix A: Organizational Function and Capacity Framework

The following table lists the elements and measures in the Organizational Function and Capacity Framework. The source column indicates the reference for a particular measure (denoted by a numerical code, see the bottom of the table for the full list of references). If no source is listed, the measure was developed by TIEMH researchers to elicit additional information. The data source column indicates if a measure was included in the survey, site visit, or interview. The RCOs were only administered the survey and therefore this report only includes the measures from the “Survey” data source. The report column indicates whether or not a measure is included in both this report and the site reports, or the site reports only. No site reports were developed for RCOs.

<b>Organizational Function</b>				
<b><i>DOMAIN: Organizational Development, Mission, and Purpose</i></b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Organizational Development	Age of the organization	1	Survey	Both
	Who founded the organization	8	Site visit	Both
	Reason(s) the organization was founded	8	Site visit	Both
	Areas of organizational development	8	Site visit	Site Reports
	Impetus for organizational development	8	Site visit	Site Reports
	Developmental milestones	8	Site visit	Site Reports
Organizational Mission and Vision	Organization has a mission statement	2,3,5,7	Survey	Both
	Organizational mission statement	2,3,5,7	Site visit	Site Reports
	Organization has a vision statement	2,3,5,7	Survey	Both
	Organizational vision statement	2,3,5,7	Site visit	Site Reports
	Things that embody the organizational mission		Site visit	Site Reports
Organizational Purpose	Unique purpose of the organization in the community	8	Interview	Site Reports
<b><i>DOMAIN: Operational Management</i></b>				
Program of Services and Activities	Number of days and hours organization is open to members	1,4,6,9	Site visit	Both
	Whether or not the organization offers services at more than one site	1	Survey	Both

<b>DOMAIN: Operational Management, continued</b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Program of Services and Activities, <i>continued</i>	Number of sites at which services are offered	1	Site visit	Site Reports
	Location(s) of the additional sites	1	Site visit	Site Reports
	Types of services and activities offered	1,4,6,9	Survey	Both
	Service and activity schedule	1,4,6,9	Site visit	Site Reports
	Work unit activities	1,4,6,9	Site visit	Site Reports
	What services and activities are offered at different locations	1	Site visit	Site Reports
	How programming information is communicated to members	1,4,6,9	Site visit	Both
Members and Membership Management	Criteria to become members	1	Site visit	Both
	Guidelines members must follow	1	Site visit	Both
	Questions heard most often from members	1,4,6,9	Interview	Site Reports
	How members benefit from participation	4,6,9	Interview	Site Reports
Staff and Staffing Management	Number of staff	1,7	Survey	Both
	Number of volunteers	1,7	Survey	Both
	Number of part- and full-time staff	1,4,6,7	Interview	Both
	Number of part- and full-time volunteers	1,4,6,7	Interview	Both
	Number of staff that identify as peer providers	1,4,6,7	Interview	Both
	Number of volunteers that identify as peer providers	1,4,6,7	Interview	Both
	Number of staff that are Certified Mental Health Peer Providers	1,4,6,7	Interview	Both
	Number of volunteers that are Certified Mental Health Peer Providers	1,4,6,7	Interview	Both

<b>DOMAIN: Operational Management, continued</b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Staff and Staffing Management, <i>continued</i>	Whether or not organization has job descriptions for paid staff	2,3,5	Survey	Both
	Whether or not organization has job descriptions for volunteer staff	1,4,6,7	Survey	Both
	Types of benefits offered to paid staff	2,5	Survey	Both
	Questions heard most often from staff		Interview	Site Reports
	Staff strengths		Interview	Site Reports
Financial Management	Description of financial policies and procedures	2,3,4,7,8	Interview	Both
Operational Policies and Procedures	Whether or not organization has written policies and procedures	2,3,4,5,8	Survey	Both
	How frequently the written policies and procedures are reviewed	3,5	Survey	Both
	Whether or not organization has written bylaws	4,6,7,8,9	Survey	Both
	Whether or not organization has a written code of ethics	2,3,5,7	Survey	Both
	Description of additional written policies and procedures	2,3,4,5,8	Interview	Both
Member Involvement in Organizational Operations	How members are involved in the day-to-day function of the organization	4,6,9	Site visit	Both
	How members are involved in the overall function of the organization	4,6,9	Site visit	Both
<b>DOMAIN: Governance and Leadership</b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Board of Directors	Whether or not organization has a board of directors	1,9	Survey	Both
	Number of board members	1,4,5,6,7	Interview	Both
	Board composition: how many board members identify as peers	1,4,5,6,7	Interview	Both

<b>DOMAIN: Governance and Leadership, continued</b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Board of Directors, <i>continued.</i>	Board composition: how many organization members serve on the board	1,4,5,6,7	Interview	Both
	How frequently the board of directors meets	1,4,5,6,7	Survey	Both
	Whether or not board meeting minutes are made available to the public	2,3	Survey	Both
	Functions of the board of directors	8	Interview	Both
Executive Director	Tenure of the executive director at the organization	1	Interview	Site Reports
	Tenure as executive director	1	Interview	Site Reports
	Whether or not executive director identifies as a peer	1,4,6	Interview	Both
	Functions of the executive director	8	Interview	Both
	Whether or not organization has a written succession plan for the executive director	2,7	Interview	Both
<b>Organizational Capacity</b>				
<b>DOMAIN: Operational Resources, Knowledge, and Skills</b>				
Staff Development	Whether or not training is offered to new staff and volunteers	2,4,7	Survey	Both
	Type(s) of training offered to new staff and volunteers	2,4,7	Interview	Both
	Whether or not ongoing training is offered to tenured staff and volunteers	2,4,7	Survey	Both
	Type(s) of training offered to tenured staff and volunteers	2,4,7	Interview	Both
Program Development	Organization engages in formal program development	2,4,6,7,9	Site visit	Both
	Organization engages in informal program development	2,4,6,7,9	Site visit	Both
	If and how members and staff are involved in program development	2,4,6,7,9	Site visit	Both

<b><i>DOMAIN: Operational Resources, Knowledge, and Skills, continued</i></b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Technology Resources	What technology resources are utilized by the organization	1,5,7,8	Survey	Both
Legal and Liability Management	Whether or not the organization has 501(c)(3) nonprofit status	2	Survey	Both
	Whether or not the organization has insurance coverage	3,7	Survey	Both
	What type(s) of insurance coverage the organization carries	3,7	Interview	Both
Data Management and Reporting	Whether or not the organization collects data for reporting purposes	2,3,5,7	Survey	Both
	What types of data are collected (e.g., member information, outputs, and outcomes)	2,3,5,7	Interview and Site Visit	Both
	How data are collected	2,3,5,7	Interview and Site Visit	Both
	How and to whom data are reported	2,3,5,7	Interview and Site Visit	Both
Funding and Funding Development	Organizational budget	1,2,3,5,7,8	Survey	Both
	Funding sources	1,2,7	Survey	Both
	Current and potential funding sources under development	3,5,7	Interview	Both
	Most and least sustainable funding sources	8	Interview	Both
	Barriers to identifying and obtaining funding sources	2,5,7	Interview	Both
Facilities	Organization facility is rented, owned, or donated in-kind	1	Site visit	Both
	General location of the facility	4,5,6,8,9	Site visit	Site Reports
	Map of the facility (if applicable)	4,5,6,8,9	Site visit	Site Reports
	Strengths of the facilities	4,5,6,8,9	Interview	Site Reports
	Aspects of the facilities needing improvement	4,5,6,8,9	Interview	Site Reports
Training and Technical Assistance	Areas of training and technical assistance needs	2,7	Survey	Both

<b>DOMAIN: Adaptability and Sustainability</b>				
<b>Element</b>	<b>Measure</b>	<b>Source</b>	<b>Data Source</b>	<b>Report</b>
Strategic Planning	Whether or not an organization has a strategic plan	2,3,5,7,8	Survey	Both
	How frequently the strategic plan is reviewed	2	Survey	Both
	Whether or not an organization has written goals and objectives	2,3,5,7	Survey	Both
Partnerships and Alliances	Whether or not an organization has strategic partnerships and alliances	4,6,7,8	Survey	Both
	With what types of organizations there are partnerships and alliances	4,6,7,8	Survey	Both
Community Outreach	Methods an organization utilizes for community outreach	2,3,4,5,6,7	Survey	Both
Advocacy	Types of advocacy in which organization engages	3,5,7,8	Interview	Both

[1 – Kaufman, Stevens Manser, Espinosa, Brooks \(2011\)](#)

[2 – Snow \(2012\)](#)

[3 – The Nonprofit Association of Oregon \(2015\)](#)

[4 – Council on Accreditation of Peer Recovery Support Services \[CAPRSS\] \(2019\)](#)

[5 – Corporation for National and Community Service \(2017\)](#)

[6 – Campbell \(2009\)](#)

[7 – Marguerite Casey Foundation \(ND\)](#)

[8 – Lusthaus, Adrien, Anderson, Carden, & Montalvan. \(2002\)](#)

[9 – Clubhouse International \(2018b\)](#)

# Appendix B: Survey

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## About this survey:

The Texas Health and Human Services Commission (HHSC) has contracted with the Texas Institute for Excellence in Mental Health (TIEMH), a research institute in the Steve Hicks School of Social Work at the University of Texas at Austin, to describe the function and explore the capacity of peer-run and peer-involved organizations in Texas.

The purpose of this survey is to identify: 1) best practices for peer-run and peer-involved organizations, 2) the capacity strengths of these organizations, and 3) areas where these organizations need support to maintain, or develop, capacity. You are invited to complete this online survey because you are a director of a peer-run or peer-involved organization. Your responses will help build an understanding about the function and capacity of these organizations in Texas.

- The survey should take approximately 40 minutes to complete. If you are unable to complete the survey in one sitting, you may save your responses and continue when it is convenient.
- Your participation is voluntary. You do not have to answer every question. You may stop participating at any time.
- Your decision to participate or not will have no effect on your employment, your relationship with the Texas Health and Human Services Commission, or your relationship with the University of Texas.
- Your name, IP address, and email address will not be stored with your responses.
- The survey is confidential and survey records will be kept private. Data will be reported in such a way that your identity will not be revealed.
- The risks of participating in this survey are minimal, and are no greater than the risks ordinarily encountered in daily life.

If you have any questions about this survey you may contact Juli Earley at the Texas Institute for Excellence in Mental Health at the University of Texas, by phone: (512) 232-8599 or email: [juli.earley@austin.utexas.edu](mailto:juli.earley@austin.utexas.edu).

If you agree to participate in the survey, please click the "I Agree" button below.

- I agree**
- I decline to participate at this time**

Please select the term that best describes this organization.

- Clubhouse
- Recovery Community Organization
- Consumer Operated Service Provider (COSP)
- Other (please describe) \_\_\_\_\_

How long has the organization existed?

- Months \_\_\_\_\_
- Years \_\_\_\_\_

Does this organization provide services at more than one location?

- No
- Yes

Which of the following services or activities are available at this organization? Select all that apply.

- Advocacy
- Assistance navigating health systems
- Assistance with basic needs
- Bus passes or taxi vouchers
- Child care
- Computer/technology classes
- Crisis support
- Education/GED assistance
- Fitness/wellness classes
- Member self-advocacy training
- Housing assistance
- Life skills training
- One-on-one peer support
- Peer support groups
- Recovery education
- Social or recreation activities
- Social engagement/informal peer support
- Opportunity to work or volunteer at the organization
- Transportation using organization vehicle
- Vocational/employment assistance
- Warm line
- Wellness Action Recovery Planning (WRAP)

What other services or activities are offered by this organization? Please describe here.

\_\_\_\_\_

What is this organization's annual budget?

\_\_\_\_\_

From what sources does this organization receive funds? Select all that apply.

- Contract with Local Mental Health Authority
- Contract with Texas Health and Human Services
- Grants
- Donations
- Revenue from services provided

Other (please describe) \_\_\_\_\_

How many paid staff work at this organization?

How many volunteers work at this organization?

Does this organization have written job descriptions for paid staff positions?

- No
- Yes

Does this organization have written job descriptions for volunteer positions?

- No
- Yes

What benefits does the organization offer to paid staff? Select all that apply.

- Dental insurance
- Health insurance
- Paid sick leave
- Paid vacation
- Retirement plan
- None offered
- Other (please describe) \_\_\_\_\_

Does this organization hold staff meetings (for volunteer and paid staff)?

- No
- Yes
- Unsure

Does this organization have written policies and procedures?

- No
- Yes
- Unsure

How frequently are the written policies and procedures reviewed?

- Monthly
- Quarterly
- Annually
- Every two years
- Every five years
- Documents have not been reviewed

Do new staff (paid or volunteer) receive training?

- No
- Yes
- Unsure

Do tenured staff (paid or volunteer) receive ongoing training?

- No
- Yes
- Unsure

What technological resources does this organization have? Select all that apply.

- Cell phones
- Computers
- Copiers
- Email access
- Fax machines
- Internet access
- Tablets
- Social media access
- Website
- Other (please describe) \_\_\_\_\_

Does this organization track data for reporting purposes?

- No
- Yes
- Unsure

Does this organization have insurance coverage?

- No
- Yes
- Unsure

Does this organization have 501(c)(3) status?

- No
- Yes
- Unsure

Which types of training and technical assistance do you feel would benefit this organization?

- Board development
- Conflict resolution
- Developing strategic partnerships
- Fiscal management
- Fundraising
- Grant writing
- Leadership development
- Marketing/building public awareness
- Nonprofit management
- Performance evaluation
- Program development
- Personnel management
- Strategic planning
- Supervision
- Use of computers
- Other (please specify) \_\_\_\_\_

Does this organization have a board of directors?

- No
- Yes

How frequently does the board of directors meet?

- Weekly
- Monthly
- Quarterly
- Annually
- Other (please describe) \_\_\_\_\_

Are the board meeting minutes made available to the public?

- No
- Yes

Does this organization have written bylaws?

- No (1)
- Yes (2)
- Unsure (3)

Which of the following does the organization have in a written format? Select all that apply.

- Mission statement
- Code of ethics
- Vision statement
- Goals and objectives
- This organization has none of these in a written format

Does this organization have a strategic plan?

- No
- Yes

How frequently is the strategic plan reviewed?

- Quarterly
- Annually
- Once every two to four years
- Every five years
- Never

Does this organization have partnerships or alliances with other organizations?

- No
- Yes
- Unsure

Please list the organizations with which there are partnerships and alliances.

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How does the organization communicate with the public? Select all that apply.

- Fliers
- Giving presentations in the community
- Hosting tours or open-houses
- Letters
- Social media
- Visiting local businesses and organizations
- Website
- Other (please describe) \_\_\_\_\_

You have reached the end of the survey!

Thank you for taking the time to participate.

You will have an opportunity to review your responses on the next page.