



January 2022 Webinar – Seed Sower

[00:00:00] **Michelle Day:** [00:01:00] Good afternoon, everyone. And welcome to the Fletcher Group Rural Center of Excellence's webinar series. Today's session is scheduled to run from 2:00 PM to 3:00 PM Eastern Standard Time. My name is Michelle Day. I am your moderator for the session, along with Jennifer White and Erica Walker. A couple of brief housekeeping items and then we'll begin. You enter today's session on mute and your video was off and will remain so for the entirety of the webinar. Your chat feature is located at the bottom right of your screen. Use the drop down feature to communicate with either the panelist's only, or panelist's and attendees. Please direct all questions regarding the webinar content to the Q and A section.

Be advised that this meeting is being recorded and will be available to you on our website once it has been transcribed. You can access our website at [00:02:00] www.Fletchergroup.org. Also at the conclusion of today's session, there will be a short survey regarding the webinar content. Your participation in that survey is greatly appreciated, and will only take a few moments to complete.

At this time, I would like to introduce today's presenter, Jay Phillips, executive director of the seed seller recovery home in West Virginia Jay's professional career began in the United States army first as a Russian linguist with military intelligence. Then with the defense threat reduction agency, working to prevent the proliferation of chemical, biological, and other weapons of mass destruction.

And finally, as an instructor in charge of the Russian arms control speaking proficiency course at the defense language Institute in 2013, Jay completed his MBA at West Virginia university, focusing on computational data extraction modeling and strategic [00:03:00] planning that he then applied as a civilian employee of three government agents.

The department of defense, the department of veterans affairs and the internal revenue service, a deep passion for service to others, particularly those marginalized and stigmatized because of a substance use disorder lead Jay to retire in 2021 to devote himself to Seed Sower, a recovery home. He launched in West Virginia where he lives with his wife and three sons.

Jay, the floor is yours.



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[00:03:35] **Jay Phillips:** Good afternoon, everyone. Thank you for that introduction and welcome to our webinar. This is Rural Recovery Housing: Overcoming Challenges for the Common Good hosted by the Fletcher Group and present, presented by Seed Sower, Incorporated. My name is Jay Phillips. I'm the Executive Director of Seed Sower, and we are a residential recovery organization in Southern West Virginia.

So first, I think it's important to just say [00:04:00] thank you, um, building recovery organization of any kind is daunting as a challenging endeavor. And it comes with a lot of bumps and bruises along the way. Um, and it takes a special dedication to see that mission come to life. So I'm grateful for the, the work that everyone is attending this presentation is doing because it shows a great care for the mission of recovery across the nation.

So a little bit about Seed Sower. Um, we were originally incorporated in 2013. Uh, we officially launched our operations in 2020 after receiving our 501c3 designation. Um, our mission is to provide safe, supportive housing, recovery, support services, and transportation for adults in active recovery from a substance use disorder. Uh, which drives our vision, which is to empower the creation of ecosystems of sustained holistic substance use disorder recovery across our state and across the region today, we just have three simple goals for this webinar.

The first is to identify and discuss some lessons learned in rural recovery [00:05:00] development, um, to have a chance for a conversation and share some ideas and insights and questions and, and hopefully make some connections because I think that last point is really crucial. Uh, it's hard for any person in recovery, uh, recovery operators as well are also most successful when we work together in a connected network of shared resources.

So a little bit about our agenda. This is a little roadmap for the next 30 minutes or so we'll talk a little bit about facility and program planning, including some of the challenges we faced specifically here at Seed Sower in West Virginia. Uh, we'll talk about the importance of planning and planning strategies, uh, the power of partnerships and the recovery ecosystem, uh, followed finally by a unit on focus and flexibility and the need to remain agile.

And what I'm sure you all know is an ever shifting recovery landscape. So we'll start off first talking about facilities and programming, some considerations and



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opportunities. When you're designing a [00:06:00] residential recovery program, there are of course, some very basic, yet crucial questions that should be asked, uh, such as who are you going to serve and why did you choose them? Is someone already serving them in your area?

And if so, are they serving them effectively? Um, where are you going to establish your residence? How conveniently located is your residence going to be to other community resources? In Seed Sower's case, that's not at all. We're several miles from the nearest anything. Um, what level of service or what service intensity do you hope to provide and what will your capacity, how many beds will you have? For most residential recovery operations that means that at what NARR level do you plan to operate? Of course, that's the National Alliance of Recovery Residences. Um, and you'll notice that that left-hand column the considerations. Those are all directly mission-focused questions about capacity and your resources come a little bit later. But then we can, after that we can zone in on the opportunities that are available to you in the region that you select.

Uh, what is the composition of your surrounding communities? Are there [00:07:00] local, uh, state offices nearby, like your Department of Health and Human Resources or any workforce engagement agencies? Um, is there a robust and healthy faith-based community in your neighborhood? Or how about foundations and civic organizations?

Many foundations I've found throughout Seed Sower's journey, uh, are county or municipality specific. So it's good to identify them early and engage them often. And then don't discount the power influence of Rotary Clubs and other civic clubs. As an example, uh, I presented our program to a Rotary Club at a nearby town and eight months later, the president of that Rotary Club became the mayor of the town that it was located in. Uh, particularly in rural communities, as many as you probably already know, everyone knows everyone and relationships are key. Then there's higher and adult ed education, uh, institutions. This is a big need as I'm sure most of, you know, what are your local resources for education such as getting a GED, vocational schools or community colleges or training opportunities [00:08:00] or smaller scale initiatives like literacy programs or life skills training.

And finally a good, reliable behavioral health and medical health provider relationship is a crucial need, as I'm sure you're aware, uh, SUD problems often



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come with co-occurring mental health conditions and sometimes histories of trauma. Trauma informed care is important and having a good relationship of your available licensed behavioral health centers and medical centers in the region are incredibly important.

Uh, we Seed Sower has an MOU with a local, uh, licensed behavioral health center in our region for the provision of all of our MAT and behavioral health care needs. So you've chosen your region, your location. You've identified some resources, now we can drill down into some more specific information such as your facility planning.

Um, the picture on your screen is Seed Sower Village. This is our first recovery residence in West Virginia. It has, uh, 11 beds on 6.3 acres, uh, in the beautiful [00:09:00] Greenbrier, uh, Greenbrier River Valley in West Virginia. It's on a hillside over looking a beautiful valley. It's very pretty and serene and secluded place that's safe for recovery operations. So if we're reflecting back on the previous slide that I talked to about those considerations and those opportunities, uh, these are the major ones that we identified for Seed Sower. In our specific programming need we focused in on adult women specifically, and that's because of the next bullet point, the recovery resources in place. There was not one single bed for women in our, uh, county or in many of the surrounding counties.

And those in the surrounding counties were few and hard to find, or they were full. For our property, location and geography we have a very easy access to the interstate, but we are also located on secondary roads and this particular area, geographically, the Greenbrier Valley, um, is, is brutalized in the winter by snow and ice.

[00:10:00] Uh, as the case in point for immediately following this webinar, I'll be hitting the road back home because we're expected to have six to eight inches of snow here in about two hours. When you're talking about proximity to service and communities, uh, our community is located in Dawson, West Virginia, which is centrally located in between three midsize communities so that we have great access to all three of them.

Um, but we are very rural. So we're not, we don't fall under any zoning regulations. For community resources, the things we identified as resources we can take advantage of in our region. Uh, we have Seneca Health and the



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Crosswind Center they provide our behavioral health care needs. Rainelle Medical Center provide our medical care.

Uh, and there are some intensive outpatient programs in the region as well. And some other recovery residences that we've made contact with and we try to collaborate with. Uh, we're very closely tied with some state agencies in our region that would include the county drug court. Um, we have a very good working relationship with the drug [00:11:00] court, um, with DHHR, uh, some other

facilities as well. And then we do make an attempt to get out into the faith-based community and make connections as well. They're often very, uh, uh, very eager to serve and very eager to help out. They can be a great resource to connect with and I, I mentioned earlier the Rotary and similar, uh, similar clubs. Um, and in our region, we have a lot of surprisingly, a lot of educational opportunities for the rural community that we're in, such as the West Virginia School of Osteopathic Medicine, WVU Extension Service, the West Virginia Adult Education Organization, and multiple smaller colleges and vocational schools.

So more specifically after planning and purchasing, we began the often tedious process of renovation and retrofitting our property. Uh, this area is maybe the most frustrating because it can be very complex time consuming and sometimes inseparably boring, but it's a necessary evil to establishing a successful [00:12:00] facility and especially avoiding costly errors and development.

Uh, Well, first, it's important to know how your location is zoned. So in your planning and zoning, that's normally your county, um, uh, code enforcement and department of planning and permits. Uh, I would actually contact them prior to actually purchasing your property so that you can make sure that you're not, that property is not located in a zoned area that would be prohibited to building a recovery residence.

Uh, secondly, each state or region may be different on how recovery residence is classified. Uh, in West Virginia, we're not classified as a group home as it would otherwise have been classified in many of the, uh, and many other surrounding states and in West Virginia prior to a change in the law, um, we are classified as a single family residence.



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That is a very important point that we're going to talk about a little bit more when we get into building fire codes and the health department. Um, so like I said earlier, though, we're not zoned. We are miles away from the [00:13:00] nearest town. So we don't fall under commercial or residential zoning laws. So construction and renovation.

No. One of the first things that I found when we were building our recovery residence is to be very familiar with the federal and state requirements for competitive bidding processes for selecting contractors. Um, if you are federally grant funded, there are prescribed in the, in the code of federal regulations

there are prescribed limits at which your bidding structure has to adapt, whether it's a sealed bid or an unsealed competitive bid. So it's good to make sure that you get those relevant federal codes so that you can know what kind of bidding process you'll have to need based on the size and scope of your project.

Um, then once you've got that lined out, there's something else that I learned is to be very, very selective in your contractors. Take the time to talk to their references and schedule some time if you can, [00:14:00] maybe to go view some of their past work, if that's available. And of course, make sure that they have the necessary licenses and insurance coverages.

And that next column is building and fire codes. And I'll tell you, nothing says, I don't want to do this anymore like having to research, building fire and sanitation codes, but it is a very important step in your development. You'll definitely want to contact all of these at the very early stages to make sure that you're aligned with each of those codes.

Every step of the way. For rural recovery. For example, water and septic systems are typically governed by the health department and they will want detailed plans and to come out and physically inspect the stages, if you have to put in either a new well or septic system or to expand on existing assessment system. Um, for building and fire codes, uh, you, you know, you want to get your permit on the wall before you start a new major projects.

Uh, and then you're gonna want to make sure that your contractors familiar with the code enforcement, um, process, so that those inspections that come [00:15:00] along the way of your construction or your renovation projects are in line with building code, because there are plenty of stories out there of recovery



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residences getting 60, 70% into their construction project and then having to undo \$30,000 worth of work because the underlying work such as the foundation, wasn't up to code and had to be redone. Then, um, something I wanted to talk about.

After that point, where I said, you know, you make contact with these resources very early and often to avoid costly do overs. Uh, one of the things that we ran into at Seed Sower is in rural if you're an, a, an urban or a suburban area, uh, many codes will require that you have a sprinkler system in your house, depending on the number of residents, the number of beds that you have.

Well, if you're on a rural, um, property that doesn't have access to the city and county grids, uh, you're on a well and a septic system. And I don't know if you've ever priced out having to put a sprinkler system in on a property serviced by [00:16:00] a well, but it is enormously expensive. Cost prohibitively so. And in the hundreds of thousands of dollars. Uh, but through discussions with code enforcement and with the State Fire Marshal, we were able to determine that there was a legislation passed in West Virginia in 2020, that stipulates that if

residence could be a building that is considered a single or double family residence that it does not fall under commercial state fire code regulations, which means it does not require a sprinkler system, no matter how many people are in it. As long as it can be considered a single family dwelling. House bill 4620, as it says on the screen there stipulates that you would fall under the code regulations for the State Fire Marshal and the building codes for residential, not for commercial, uh, construction.

That was a huge, I mean, that was just a monumentous discovery for us because it means that we were no longer required to have a sprinkler [00:17:00] system and we can proceed with the bidding and the construction process. Um, although we still, and I would recommend this, we still had the State Fire Marshal come out and do an inspection and advise us on things that were not cost prohibitive that could make sure that our residents were safe and secure.

Then with the health department, uh, we, we got our well and our septic systems up and we found out later in the process that after we were complete, no matter whether we were commercial or residential, we still have to apply for a, uh, general sanitation permit, um, which we did that late in the game.



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Luckily it didn't cost us anything. It's just something to be aware of. And you're only required to have a food service permit if you are preparing meals with staff, if you have like a cafeteria staff preparing meals. So the short and long of that is you're going to run into a lot of bumps along the way of your project development.

I would definitely recommend that you get in contact with all of those offices at the very earliest planning stage to get them involved [00:18:00] because you want them involved early rather than at the last minute. So we've talked about our facility and location and the exciting worlds of codes and bureaucracy.

Now let's have a 30,000 foot discussion on sustainability. And this section, we're going to focus on what I consider to be the three fundamentals of your development. And that's the mission, the method and the money. So first let's talk about the mission statement.

The mission statement is the north star that guides your ship. When you're starting to craft it, ask who you're writing it for. I feel like many cases companies will say, I've got a great idea. I've got a lot of great people. And, um, and, but I guess I need to put together a mission and vision statement. So let's crank that out real quick, because it's required in the grant application that I'm working on. But here's the deal.

Nobody says I'm on an idea. They say I'm on a mission. Missions are specific. They're laser focused, they're powerful. And they drive the vision for your [00:19:00] company. My favorite vision statement ever is one for the Michael J. Fox Foundation. Basically their mission statement is to cure Parkinson's Disease and go out of business.

It doesn't get clearer or more succinct than that. Your mission should be that clear, and it should be the compass that guides your actions to enact your vision in the region you're working in. To do that, one of the exercises we did in the very beginning was to compress our mission into an eight word mission statement.

And that's exactly what it sounds like. It's cranking it down into eight words. It forces you to be very careful in your word selection and to clearly, and succinctly, and specifically define just what it is you're going to do and how you're going to do it. Every word should be carefully chosen and crafted to



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encompass your full mission while allowing for flexibility and agility and preventing mission creep, which we'll also talk about a little bit.

So once that's completed, we began to use our mission statement as the filter, through which all of our decisions had the flow. If it didn't fit through the filter, we, it didn't make it [00:20:00] into our operations. And so you heard our mission and vision at the beginning of this presentation, we compressed that into the eight words, "Sustaining holistic recovery through housing, transportation, and education.

If anything that we're doing can't flow through that filter, then we have to stop and consider saying no. Once you've decided on your filter and you've passed your initial ideas through it, it's time to plan how you're going to execute, execute that vision. For me, there's no reason to reinvent the wheel. I still use the tried and true smart plan. Uh, it's well known and it's, and that's because it works. Uh, smart plans are specific, measurable, achievable, achievable, excuse me, relevant,

and time-bound. Specific. It's just something that, that operationalizes the goals that you have that are directly supported by your mission statement and directly lead to the implementation of your vision. Um, measurable. You don't know how well you're doing something. If you can't evaluate the benchmarks along the way.

So it has to be measurable activity at all levels [00:21:00] that you can gauge your effectiveness along the way and making sure you're hitting your goals. It has to be achievable. Uh, you have to create goals that are based on robust and intelligent information. And it has to be something that that's actually realistic, something that you know, that you can accomplish within the time constraints that you've given, that, that project. It needs to be relevant.

So they should be aligned with the company objectives, um, but reflective of the community reality. And you can't say, you know, I'm going to build a great big swimming pool in the desert because that's just not reflective of your community reality. And finally, time-bound, uh, don't be afraid of deadlines and working with urgency, but understand the difference between working with urgency and working with haste.



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You always want to have that sense of urgency in your mission accomplishment, but not at the risk of your mission effectiveness.

So you've got a mission. You've got a plan. Now you got to pay for it. That's where diversified funding streams comes in. And this is where I get to [00:22:00] just for a moment brag on the Fletcher Group for a minute. They have been such expert guidance for, for our organization. And I know several others on just how to develop diversified funding streams, and how crucial that is to allowing you the flexibility to really make an impact in your mission.

Um, you may notice that I put mission and planning ahead of the money. For Seed Sower I do that intentionally because it's so, so, so tempting sometimes to chase the money and let the money define your mission. And that's a dangerous road to travel on. I start with the plan. Then we put those plans into action by seeking out the funding to support them not the other way around.

Most nonprofits break their funding into three categories, grants, program, revenue, and donations. While those are certainly true, in my opinion they each break down into much smaller components that offer many different opportunities that some of the broader categories missed. Um, I hear a lot of times I never, never heard of that program, or I've never heard of that organization.

So I like to break [00:23:00] my funding options down into five major categories instead of three. Uh, the program category grants doesn't even make the list because while grants are a major line of funding, for many of us, they are a tool utilized by organizations. And the organizations and the relationships you develop with them are how I break down the funding.

So, for Seed Sower, in addition to our program revenue, we fund our operations through five major groups. Federal state, local and municipal corporate, and community or individual support. I'm going to take a little deeper dive into each of those real quick.

So, in the federal funding streams, there are particularly in our neck of the woods, and I'm sure this is different for some of the people who may not be in the Appalachian region, but the ARC, the Appalachian Regional Commission is a huge, um, federal funder for us. Um, if you could advance the [00:24:00] slide, please.



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So the ARC is a big funding source for a lot of recovery programs in the Appalachian region. They're focused on coal impacted communities. Their INSPIRE program is specifically designed to support recovery ecosystems in the POWER program is, is work opportunity and engagement initiatives. Um, the USDA is a great resource that many people overlook.

They have a community facilities grant that will fund a significant amount of your equipment needs, uh, including vehicles. So, uh, typically the, uh, USDA community facilities grant works based on, um, how your particular region is classified. But in our case, they'll fund, uh, up to 30% of our equipment costs not to exceed \$50,000.

Of course there's HUD, the federal program, where you can get permanent supportive housing vouchers for anything over one year of housing. Um, and then there for your larger projects, you have, uh, federal agencies like the Federal Home Loan Bank. Um, [00:25:00] ours is the Federal Home Loan Bank of Pittsburgh in our region. Where you can take on your, your larger construction projects through LIHTC funding, which is Low-Income Housing Tax credits.

At the state level, uh, your DHHR, Department of Health and Human Resources, if they have something similar to the Bureau for Behavioral Health, that is an invaluable resource for state money that comes down from the federal government and is allocated out into the communities. Um, we, our Ryan Brown grant recipients that allowed us to purchase the property on which our residents is located, but they also have residential boarding grants, uh, brief intervention, uh, MAT and QRT grants.

And then that last one in the state column, the Housing Development Fund has the Affordable Housing Fund, which was a great resource for us as well. But then there's the Mountaineer Rental Assistance Program, which is something kinda new. Um, it's something where this was for rental assistance, for people who couldn't make their rent or their mortgage payment during hard times.

But they've extended that in most [00:26:00] places now to recovery residences to cover programming fees. So if you have someone who, um, maybe was experiencing homelessness before they came to your program and they come into your program, you can apply to come to organizations like the Mountaineer Rental Assistance Program, uh, to get those programs fees covered. Locally,



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we talked a little bit about this civic organizations, uh, direct public support from, uh, small groups and individuals, faith-based organizations, community groups, individual donations. And then corporate. And this one was another one that, uh, can often get overlooked, like the Benedum Foundation or a smaller regional foundation here in West Virginia, the Beckley Area Foundation, um, national you've got things like Bill and Melinda Gates.

And if you've never heard of TechSoup, that's another one I'm really fond of. They don't provide money, but they provide access to discounts and a lot of different equipment that nonprofits need like computers and software programs. And, you know, QuickBooks, if you're into QuickBooks or things like that. Corporately, [00:27:00] um, a lot of banks and other corporations are starting to realize the value of partnering with their local and regional partners to fund community investment initiatives.

The Truist Foundation has done a lot of good programs. Um, the United Way, even our American Electric Power, uh, here has programs that most people have not even heard. And then there are private foundations, like in our region, the James F. B. Peyton Fund, which we only found through, uh, researching local foundations in our area.

We found one called the Greater Kanawha Valley Foundation. And that foundation, all it does is work is not all it does, but predominantly what it does is works as a clearing house for other funding organizations and they'll post grant sources up there, the Greater Kanawha Valley Foundation. That's how we found that James FB Peyton fund, which gave us enough money to purchase all of our furniture.

Then additional funding sources or your program fees and your meal plans, obviously a third party billing [00:28:00] through private insurance and Medicaid. Um, I think most states, but I know West Virginia does, uh, you can bill in 15 minute increments for your peer recovery support services, uh, and some 12 step group organization

plans. Um, and then you can also, as a recovery residence now be approved as a meal provider, um, to accept bulk payments from your residents for their, uh, meal fees seats. There were just got approved for that a few weeks ago. Actually, we're waiting on our equipment to come in so that we can start, uh, accepting EBT/SNAP.



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Um, there are contract services available in many states through Department of Corrections where they'll do a diversionary program to pay your bed fees, uh, where they it's like a sentence diversion program where they'll sentence someone more or less to your recovery residents. Instead of putting them in a cell and for the Department of Corrections, it's actually more effective outcomes and more cost-effective to partner with reputable recovery houses that can handle that sort of thing.

And there are a few of those in [00:29:00] West Virginia. We do not currently have one, but it certainly works, something certainly worth looking into. Uh, then finally this one's not money specifically or not all of it, but there's technical assistance. And there are lots and lots of organizations out there that they give technical assistance.

Of course, our flagship is the Fletcher Group who was gracious enough to host this webinar. Today. I've had numerous meetings with the Fletcher Group at least weekly for the last year and a half. Um, and they have been an invaluable guide, uh, as we've grown and developed this project. And now working at, even into our second project and a new community this year. Um, the Affordable Housing Fund, we talked about that earlier.

Uh, they have money for pre-development costs and organizational technical assistance costs. So there are plans and grants out there specifically to fund, you know, finding an architect that can draw up your plans or things like that, or, or developing your, um, plans over the next six months. Seek those [00:30:00] out early and often, and try to find those funding resources.

And then finally we talk about individual and business donations. Um, when I first started Seed Sower, um, I considered donations to be an immediate, crucial foundational component of our finance structure and I was wrong just. Because you have a great idea or even a great plan that doesn't mean automatically that people are going to blindly throw their hard-earned financial or volunteer support behind you.

They have to know what your money's doing and how effectively it's doing it. And those are both hard to prove in your startup stage. What I learned is that the best strategy is not focusing on getting those early donations, but on building those early relationships. Uh, fundraisers are great and important.



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Donations are needed for sure, but it's hard to survive on one off \$50 donations, donations on Facebook or on a bake sale. So, what you need is consistent, meaningful relationships at the individual and corporate levels, and that takes time [00:31:00] and energy, but it is so worth it in the long run. To build those relationships.

Uh, we developed an outreach and engagement plan early with our marketing partner, which was something else that people thought in the beginning that we might've been a little bit, uh, silly to engage in. It's one of the first people that we engaged with someone that could help us develop our match messaging and craft our outreach strategy.

Um, and at the center of that as a monthly zoom call, that's available to the public, um, for Seed Sower, we call that a zoom call. It's the Community Recovery Starts with Seed Sower. It's an informational, uh, 30 minute overview of what we're doing, how we're doing it. And it gives our constituents, uh, information on

um, exactly the nature of operations and where we're offering them. And it also invites them to share their opinions, their insights, and their stories, and follow up calls. And that's step one of a multi-step engagement plan that leads to meaningful relationships with your communities and their constituents.[00:32:00]

Um, in fact, if you'll forgive the shameless plug warning, you're all invited to the next one. Uh, our next Community Recovery Starts with Seed Sower presentation is January 20th, at 6:00 PM via zoom. Um, you can register for it for free on our website. It'll give you a calendar invite, um, so that you, uh, in your very, very busy agendas, don't miss it.

Okay. Now for the really exciting stuff, uh, financial policy and fiscal controls. Okay. I know that's really boring, but it's a very important component of your, your sustainability because, um, when you're building out your systems and you're building out your finances, things can tend to grow. And I know this happened in our case, they can tend to grow very quickly.

And if you don't have sufficient controls in place to manage and measure that growth, things can get away from you in a hurry. So I think it's important to implement adequate fiscal controls early. Uh, one of the first things that I put



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into place was a dual check signing policy. So, uh, [00:33:00] one of the members of my, I can't just randomly sign checks as much as I want.

And I have my board, one of my board members has to, co-sign a check that's over a certain amount of money. Um, I keep, uh, religiously keeps supporting documentation of every dollar that gets spent. And I have spending limits in place where it requires deeper conversations before we allocate those funds.

I think it's also important to invest early in financial support, get a bookkeeper or a secure, a solid book keeping product. Um, find an accountant that you can trust and somebody to help you prepare your 990 Forms. If you're operating as a nonprofit organization, and then you want to take the time to learn your financial statements and what they mean.

And there's a lot of great resources out there to understand exactly what an income statement balance sheet and cashflow is. Um, for nonprofits, those are statements of activity and statements of financial position. It's very important, not just to be able to provide those reports, but to understand what those [00:34:00] reports mean and what they indicate for the future of your fiscal sustainability and your financial health.

Um, and when you'd have those reports. And when you understand those reports, they allow, you're allowed them to present them plainly. That helps you build trust with your constituents and ensures transparency and compliance with some federal regulations over finances for nonprofits. Um, one of the things that, uh, I tried to do very early and often is not use a lot of jargon.

Um, speak plainly, use plain language in a way that's easily digestible and to understand by the public. Um, and then finally for your major constituents, like your board, uh, major supporters and stuff like that, develop dashboards and key performance indicators that they can use to kind of get a snapshot of where you are at any point in time.

Um, that next slide is a, is kind of an example of one of the dashboards that Seed Sower uses. And this is just some of our, uh, donor records and things like that. I have, of course, I have a pixelated down at the bottom for privacy, [00:35:00] but this kind of gives you snapshots over time of how things are performing and what you might need to focus on.



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So you've got your mission and your filtered plan. You've got your operations and your facilities, and you've secured some funding and you're off and running. Here I think it's a good idea to periodically evaluate how your program is working from a sustainability perspective and how you need to integrate those results into your planning for the next year.

And the next several years. Um, this tool, the, the, um, this tool is something that I've used for a while, just to kind of periodically take a snapshot of where we are and, and identify if there are any blind spots it's called the Program Sustainability Assessment Tool, and it's free. Um, it doesn't go very deep into your operations, but it's enough to identify if there's areas you need to look more closely at without having to spend too much time.

This is something I typically run every quarter. Um, just to see where we are, you might find it useful as well. [00:36:00] Next, I want to talk about the power of partnership. And really partnerships could, and probably even should be the first section of this presentation. There's no sugar coating in my opinion. Your program might be evidence-based and well-designed, but without partnerships and community stakeholders, you'll likely be very frustrated with your progress as well as your programmatic effectiveness.

This is why um, at Seed Sower, we passionately advocate for the concept of that recovery ecosystem. You'll see a lot about that on Fletcher's website, um, individual recovery. So your residents and your clients, their recovery happens in community within their programs. Uh, the same is true in my opinion, for communities and for recovery organizations. As you'll see on the next slide, the concept of a recovery ecosystem is a complex linkage of multiple sectors, including, but not limited to recovery communities, peer support, health and human services, faith communities, criminal justice organizations, public safety, housing, transportation, education, and [00:37:00] employers.

The goal of the recovery ecosystem is to help individuals in recovery access to support services and training that they need to maintain recovery and successfully obtain sustainable and meaningful employment, but also provides for a scaffolding of support that, um, within your communities that promote collaboration and integration and coordination of services across multiple domains.



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Uh, this, in my opinion, adds multiple layers of support, not just for your residents, um, but it also adds layers of support and collaboration for your company, which is an invaluable asset. And if you can get some of these key pillars and these silos coordinated and working together, it makes for such a, uh, a more streamlined and seamless transition throughout the stages of their recovery journey so that your residents or your clients are more prepared to reenter society

at the other side of that. Um, for us, our recovery ecosystem, main partner is a, uh, a cafe and bakery in the area. Uh, that's [00:38:00] called Fruits of Labor. Uh, wherever they have a cafe, we come behind them and set up housing. So we've got gainful employment, training and certification programs, alongside housing, transportation, and recovery support. And where those are co located and coordinated,

it really makes for an effective programmatic plan. So here's why I think there are key. Effectiveness is number one, you can't be all things to all people. Uh, when next slide, please, you have to focus on your expertise and coordinate the expertise of others for your clients. This makes you more effective.

Um, effective partnerships mean that your client has access to a broad and diverse array of supports and resources for more whole person approach. It adds credibility. Uh, organizations aren't just going to blindly throw their support behind you. If you have their buy-in, it's for a good reason. And then partnerships mean connections. Connections mean bridges into your communities, and those are invaluable.

Uh, the next is collaboration with external stakeholders. Uh, [00:39:00] this opens up new avenues for your development and education, through their resources and for their development, through your resources. So very mutual organization. And that allows you to increase your reportable outcomes. And finally, nothing says I can totally do this to your grant funders like effective partnerships and their support and grant applications.

Seed Sower has been very fortunate to receive a number of federal and state grants that we would not have received were those grant applications not really undergirded and strengthened by the strength of the partnerships that we've created, including with people like the Fletcher Group and, and some more state-based organizations here locally.



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So to have partnerships, you have to attract partnerships and that's where your messaging comes in. Here's a few questions to ask. How are you engaging your stakeholders? How are you conducting your outreach and engagement, your fundraising and how are you prioritizing those relationships and why do those matter?

Some people, like I said earlier, thought I was crazy in the beginning, but one of the earliest [00:40:00] things we did at Seed Sower was to engage in an effective marketing partner. And, uh, in the recovery space, most operators have great ideas and a deep passion and commitment. Um, the trick is then to have an effective bridge from that passion and commitment to others.

And that's where your effective messaging comes in. It helps you to pay the bills. Um, Advocate and educate, uh, recruit supporters and partners, which is an area where you can discover you may be able to contribute as a partner to others as well. And finally, through these bridges and collaborations and partnerships, you're more equipped both financially and programmatically to successfully meet your organizational objectives.

And I really can't stress. I'm not going to get too deep into each of these bullet points, but I really can't stress enough how important developing these relationships and these partnerships are going to be not just for the revitalization of the individuals in your programs, but for the overall health and restoration of the communities that you live in.

[00:41:00] Um, there are a lot of talented, uh, message crafters out there. I suggest see if you can find someone to help you get yours rolling. So the last section you, you have your location, your facility, you've designed your mission of program, found some funding. The last thing I want to discuss now that you've done those is how to be focused, but flexible in your mission, implementation.

And that's where I want to get one of the most, in my opinion, difficult concepts to keep in front of us. We've all likely heard of mission creep. If you'll go to the next slide, please. But I think it deserves its own conversation because how dangerous is it to your program? So what is it? Mission creep is a gradual broadening of the original objectives of a mission of an organization leading to the dilution of its effectiveness.



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Um, There's a difference between mission creep and strategic decision-making. Um, strategic decision-making changes the mission, maybe like mission creep, but appropriately so. And one of the chief examples I like to use for, uh, an [00:42:00] example of strategic decision-making and not mission creep is the March of Dimes.

The March of Dimes was originally founded to combat polio, and then we eradicated polio. So the March of Dimes is faced with, um, some pretty key decisions. They either go out of business or they take those resources and apply it in a new direction. So they started focusing on moms and babies. That's a strategic pivot.

That's an appropriate decision based on changing realities. That's not mission creep. Um, mission creep would be if March of Dimes is trying to eradicate polio and same time, they started go work on homelessness. Um, they stretch the resources. It dilutes them and read effects, redirect your purpose. Uh, and then your mission becomes too complex.

I know that, uh, for Seed Sower, uh, specifically it, there are some opportunities that came for us. We want to help everybody. We want to extend our resources into homelessness, or I want to support veterans. I want to support other groups that are on the periphery of the substance use epidemic. [00:43:00] Um, but to commit to those means I have to, in some degree, de-commit from something that I'm already supporting and you have to be very judicious in that decision,

um, decision-making. So that's, and we talked them a little bit about this earlier, where you don't want to chase your funding, chase your beneficiaries, or chase support. Uh, you chase your mission. And if you're doing those effectively, the funding beneficiaries and support will come on. Um, and as a reminder to keep yourself protected from mission creep. Focus on that mission statement as a decision filter. Be comfortable saying no. Have a process for your decision-making. Focus on the beneficiaries of your program. And revisit and reevaluate your mission periodically.

Some final thoughts on that. Stay focused on the mission, but flexible in the execution. It's always going to take longer than you think. It's always going to cost more than you think. Keep an open mind to alternatives. Don't suffer from what I call TWWADI syndrome, "the way we've [00:44:00] always done it". Um, don't be afraid to innovate. Have a hairy audacious ideas.



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I call them think big. Um, you're more competent than you think, and your resources are more available than you might realize. And then update your evidence-basis is periodically to make sure that you're keeping up to date with the latest science. One of my favorite quotes ever, uh, Dwight D, "In preparing for battle, I've always found that plans are useless, but planning is indispensable."

And I strongly support that statement. The process of planning can oftentimes be just as beneficial to the success of your program as the result. And with that, I will say, thank you very much for joining me today. I hope it was informative, provided some good ideas that you can use in your own facilities.

And if we'll advance to the next slide, you'll see our information is listed. Um, my email and phone number. If you'd like to reach out and have some conversations, uh, I'm happy to, to engage with anyone who's interested in talking. Thank you very much. And, uh, I hope you all have a wonderful day.

[00:44:59] **Karen Coburn:** Oh, not [00:45:00] yet Jay. You've got to stay around for just a second. We're going to answer questions. (Laughter)

[00:45:06] **Jay Phillips:** I know

[00:45:07] **Karen Coburn:** Don't try to scootch out. Thank you so much Jay. This was some great information. Um, really appreciate it. Uh, we have a couple of questions, so if you're ready?

[00:45:19] **Jay Phillips:** I am ready.

[00:45:20] **Karen Coburn:** All right. Um, so you spoke about the importance of a mission statement, but what about a vision statement? Is that useful for a recovery house?

[00:45:30] **Jay Phillips:** Uh, yeah, because your, your mission statement is going to be, um, Uh, what you're, who you're going to serve, how you're going to serve them and how you're going to get there. But the vision statement is what you want that end result to be at the end of the, not the end of the journey, but at the end of the day, what do you want to create in your area as a result of your efforts?



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And I think having a, uh, an eye towards that strategic long-term goal is very important. And so your vision, I think, is, is another crucial component, but, uh, everything springs out of the mission statement, in [00:46:00] my opinion.

[00:46:00] **Karen Coburn:** Okay. Thank you. Um, and if anybody has questions, please go ahead and put them in the question and answer, the Q and A box.

Uh, I have a couple more here. Uh, you stated you're several miles away, so you're kind of, you're very rural. Um, so you're a bit away from anything nearby. Uh, so how do you ensure that you have, are, have access to needed resources?

[00:46:24] **Jay Phillips:** Well, um, one of the key notes of our mission statement since we are rural is that transportation component.

So we've tried to invest early in adequate transportation resources that we can get. We don't have a bus line or a train line or Uber drivers or a taxi out here. So we had to make sure that we were able to coordinate transportation for all of our residents, to all of their appointments. In fact, my whole staff right now is in different vehicles, going to different places with different residents to make sure that their needs are met.

[00:46:55] **Karen Coburn:** That's great. Uh, how about, uh, consideration of women and kids? That's [00:47:00] another question here. Uh, have you considered working with women with children? Why or why not? And also what do you do when someone relapses and they have to exit your facility?

[00:47:11] **Jay Phillips:** Um, so it's, it's interesting that both of those are brought up because we actually are, are piloting two new directions that we're going this year.

One of them is a program for women with children in the county, north of us in Fayette county. Uh, we're hoping to have that, uh, for pregnant and parenting women up to the age of two, I'm hoping sometime in August or September, we're in that process now. As for people who experienced a recurrence, um, you know, obviously you have to put the health and safety of your residents as a whole and your other residents in that home first.



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And so we. You can't have them stay in the residence in most cases, but, um, you also often find that there's very few resources for them to go to. You don't want to just want to put them out in the street. One of the things that we're looking at developing is, uh, what we're calling a respite center, which would be [00:48:00] a set aside wing just for people who have experienced a recurrence so that you still have them actively and positively engaged in your programming without having to send them to, uh, outside withdrawal management or, or a hospital or something like that.

Or God forbid back into the neighborhood that they were struggling in, in the first place.

[00:48:19] **Karen Coburn:** Right. Um, so what, what would be the best way to find out about local foundations and civic organizations, uh, and, and really those partnerships, what potentially can they offer a recovery house?

[00:48:34] **Jay Phillips:** Well, uh, for us, uh, I think you're Chamber of Commerce's are a good place to start, but there's a lot of organizational listings there that you may not have otherwise have known about.

Um, I'm also a big, I find a lot of resources through GrantStation.com. Um, GrantStation, it's a paid resource, but to me it's worth it, uh, because your local, municipal, uh, state and federal grants, all of that's kind of a clearing house for all of that. Uh, and, and so [00:49:00] the local foundations that we have discovered we found through GrantStation, um, the, the greater Kanawha Valley Foundation, the Hallowell-Dawkins Foundation here in Greenbrier county, the James F.B. Peyton Fund, all of those smaller foundations we found through those, those clearing house sites.

[00:49:16] **Karen Coburn:** Okay. And you said that was a pay site?

[00:49:21] **Jay Phillips:** Yeah. GrantStation.com I think is a paid site, but in my opinion, it's worth the fee and I'm not getting a kickback from them, so,

[00:49:28] **Karen Coburn:** OK. (Laughter) , that's good to know. Um, did you have any local opposition or any of the, not in my backyard, the NIMBY stuff any issues of like that when you were starting the house?



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[00:49:42] **Jay Phillips:** Uh, we did actually, and we had a little bit of NIMBY syndrome because you know where we are, we are rural and we have, where we live is mostly a long established, generational little farming communities who have not really had to deal with the more [00:50:00] suburban and urban concentrated issues of substance abuse.

I mean, in West Virginia, it's pervasive everywhere. You're not going to see it anywhere. I mean, there's nowhere you can go and not see it. But recovery programs specifically in the rural areas are not common. And so it does take a lot of, you know, knocking on doors, introducing yourself, good neighbor policies are crucial in that respect.

We have a robust, good neighbor policy that outlines how we engage with our neighbors, but so far, um, we were able to overcome that, uh, through positive communication and consistent communication so that they never had to wonder what was going on.

[00:50:37] **Karen Coburn:** Alright, thank you. Um, another question here, how do you mitigate crippling liability costs that are often associated with human service

[00:50:47] **Jay Phillips:** with human service?

Is that the question how to with crippling liability, positive human services?

[00:50:58] **Karen Coburn:** I think earlier [00:51:00] she mentioned specifically around transportation.

[00:51:03] **Jay Phillips:** Oh, I see. Yeah. So as a nonprofit, when you buy a vehicle, those insurance costs can be high. Um, but I think one of the things that I prioritize when you find some operating funding, I'll always earmark some of my grants to cover some of that overhead.

And insurance is a big cost. I think our insurance liability is somewhere in the neighborhood of \$16,000 a year. Which I mean for larger organizations is, or is it, there's not a lot, but for someone smaller or midsize like us, it can make a big debt. So I always keep those larger, um, operational price tags in the back of my mind when I'm seeking grant funding. Uh, or, uh, any kind of operating funding, which sometimes they're hard to find, but very helpful.



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[00:51:50] **Karen Coburn:** Um, how was that legislation defining a recovery residence as a single family residence conceived and introduced? Were local operators instrumental in supporting [00:52:00] that?

[00:52:00] **Jay Phillips:** Um, I know that there was a lot of advocacy on the part of local operators, uh, and, uh, the West Virginia Alliance of Recovery Residences, I think had a big say in that as well. But basically it stipulated a couple of things.

It's stipulated that recovery residents had to be certified by the West Virginia Alliance of Recovery Residences in order to qualify for state funding, but it also clarified what a recovery residence was and was not for the purposes of coding because it is, it is so cost prohibitive to treat a recovery house with limited funding as a commercial entity, particularly in a rural setting because that's so expensive.

So they were basically treating our residents the way we treat our residents and that's members of a family living in the same house. So it doesn't apply though to like, if you bought a dollar general and converted it into recovery homes, and that would not exempt you because that's not a structure that could be considered a single or double family residence.

Um, but I do know that there [00:53:00] was a pretty good groundswell of support for that from both organizations and individual advocates in this region.

[00:53:10] **Karen Coburn:** Okay. And you said, um, West Virginia's, um, NARR affiliate was instrumental in that as well?

[00:53:18] **Jay Phillips:** Uh, yes, because they were part of the subject of the legislation. So it required that you be, um, certified by WVARR, uh, in order to be eligible to receive state funding.

And so there's a lot of organizations in West Virginia right now, uh, really working that process. I know WVARR's got just a flood of applications because 9-30-21 was the deadline for that certification to be complete.

[00:53:42] **Karen Coburn:** So they've been hopping.

[00:53:44] **Jay Phillips:** They've been hopping. They've been busy.



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[00:53:47] **Karen Coburn:** So, so this ties into to that somewhat. So if someone's never had contact with their legislators, can you offer some suggestions on how to build those relationships and [00:54:00] you know, the importance of them?

[00:54:02] **Jay Phillips:** Well, I think whether it's a legislator, whether it's your state Senator, or state delegate, or if it's your federal representatives in the state or the house, um, be bold and not timid in reaching out to them. Knock on their doors, give them a call, invite them to your open houses. Yeah, it may start. You can always reach out to their legislative aid.

That's, uh, that was a big step for us and getting in contact with one of our Congress people, uh, Carol Miller in our district. We, um, contacted her through her legislative assistant and her legislative assistant met with us at first. And then finally, you know, Congresswoman Miller did come out to our facility to take a look, well to a neighboring facility.

But, um, I think just be bold. Don't be afraid to ask the big questions and don't be afraid to, to, to just reach out to them directly. Um, the squeaky wheel gets the grease.

[00:54:54] **Karen Coburn:** They can't tell you no, if you've never asked them the question, right?

[00:54:57] **Jay Phillips:** Uh, I'm very fond of saying, make them tell you no.
[00:55:00]

[00:55:02] **Karen Coburn:** Um, so, and really along the same line, you have to do the same thing with the local officials, right?

[00:55:08] **Jay Phillips:** Absolutely. And this one, and I wish I had thought to put this in the presentation earlier, but one of the good things that I think you can do is get with your city councils. Get in front of your city councils and get their buy-in, show them what your program is. Let them ask questions, let them develop a comfort level with the program that you're wanting to bring into their home because it's their home.

It's not yours if you're, if you don't live there, obviously. Um, so get in front of those city councils, you know, get in contact with the mayor's office and ask if



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you can present at a city council meeting and get their buy-in. Because if you have that buy-in and you get the municipal buy-in, then it's a little bit easier for some of those community members to follow along.

[00:55:49] **Karen Coburn:** And that would help with the NIMBY as well, right?

[00:55:51] **Jay Phillips:** Definitely helped. So the, the, I think that one of the death knells, um, that can happen to you and you can fall [00:56:00] victim to NIMBY syndrome is to, to kind of rush in and throw a house together. And all of a sudden people are asking questions while you're open.

So be open, honest, and transparent in the beginning. Let them know you're acting with integrity and with good faith. And then also remind people that, um, the recovery community is the only community where you can guarantee that there's no drugs and alcohol present. It's a safe place to be, uh, filled with people who are twice as likely than the general population to contribute to the betterment or the future.

[00:56:30] **Karen Coburn:** Thanks, Jay. Um, what about, uh, the vouchers you mentioned, uh, you're not utilizing the vouchers. Um, what's the point of building the relationship with the local and state housing authorities then? How, how can they help?

[00:56:43] **Jay Phillips:** Well, it's not just about vouchers too. So there's, there's some HUD programs that are, that are different than just your place-based or person-based vouchers.

Um, there are grant programs, forgivable loan products that are available through the housing agencies. Um, but there's also, uh, like that Mountaineer Rental [00:57:00] Assistance Program that I talked about that'll help your residents pay the program fees. Um, so it's important. And especially like, if you're like, at Seed Sower we have an eye towards some larger scale projects down the road.

Um, we want to develop those relationships now so that when it comes time to answer and ask those difficult questions about how do we put this together we have resources instead of just relying on a Google search.



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Did that answer your question on that one?

[00:57:28] **Karen Coburn:** I think so that makes sense to me.

[00:57:30] **Jay Phillips:** Because we're not specifically set up our, our programming is less than a year for the two programs that we're building. And so we're not eligible for HUD funding, but as we grow that HUD funding is going to come into place. But there are other programs within the housing agencies, both at the state and federal level that you can utilize, you know, no matter how long your program is.

[00:57:50] **Karen Coburn:** Okay. Thank you. Um, how do you track your outcomes and, and why, why is it so important to you? [00:58:00]

[00:58:00] **Jay Phillips:** One of the best things that you can do to demonstrate to the public that it was worth placing their faith in you is to show them how effectively you're telling, you're doing what you told them you were going to do.

And so, um, I am well personally, I'm a big data nerd, so I like to collect as much data as I possibly can, just so I can evaluate every single aspect of our effectiveness. And that's one of the things I reached out to Fletcher Group for early was I wanted to put together, uh, more or less a research protocol so that we could really dig deep into rural programming and evaluate our effectiveness along the way so that we could make the programming better.

So the answer in the short term is twofold. One. You want to be able to demonstrate to both your funders and to the constituents that you serve, that you're doing what you say you're going to do, and you're doing it well. And two. You want to be able to look internally and identify where your blind spots are, so that you can make changes to your program so that you're serving people better.

[00:58:55] **Karen Coburn:** That's that sounds great. And I know you're, you're passionate about tracking those [00:59:00] outcomes, Jay. Uh, we have about a minute left. Um, uh, there's someone asking if, uh, they can ask how much you're charging on your program fees.



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[00:59:09] **Jay Phillips:** So we charge a \$75, a weekly program fee, um, and a \$45 per week meal fee. Uh, and our meal fee does include dinner catered by the cafe that we partner with.

Um, and then there, the rest of that meal fee goes towards breakfast and lunch. Um, but we also are looking for resources to be able to offset those fees for the residents. Cause I would think nothing is more beneficial for them when they're done with our program to have a little bit of money saved up that they can put towards their future.

[00:59:41] **Karen Coburn:** That's fantastic. Uh, any other parting words of advice Jay, before we let you go for today?

[00:59:48] **Jay Phillips:** Don't be afraid to ask questions. Don't be afraid to ask for help and don't be afraid to ask loudly..

[00:59:56] **Karen Coburn:** That's fantastic. And, uh, yeah, you can't be shy [01:00:00] and develop the housing, so, well, thank you so much, Jay. Uh, appreciate your time today. It was a fantastic presentation. Really, really enjoyed it. And, uh, everybody else, uh, in the audience, we look forward to seeing you next month.

[01:00:20] **Jay Phillips:** Thank you very much.

[01:00:21] **Michelle Day:** This concludes our webinar session. Thank you so much for joining us today. Also, please tune in on the first Thursday of each month from 2:00 PM to 3:00 PM Eastern standard time. Well, what we'll be hosting subject matter experts from across the nation to bring you valuable tools and resources for rural recovery house operators and SUD professionals.

If you would like information on technical assistance, you can go to our website again, www.fletchergroup.org, which I have also copied in the chat, and submit a technical assistance request. Lastly, please take a moment to respond to the survey questions once they become available on your screen. [01:01:00] Your feedback is very important and greatly appreciated.

Thank you and have a blessed day.