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Alumni Organizations as a vehicle for Post-treatment Addiction Recovery Support: An Interview with Lorie Obernauer and Leonard Bade

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Introduction

There is a long history of patient-led recovery mutual support organizations birthed within addiction treatment institutions in the United States. Some of the earliest of these include the Ollapod Club (1868, New York State Inebriate Asylum), the Godwin Association (1872, Franklin Reformatory Home for Inebriates), and the Keeley Leagues (1891, Keeley Institutes). Addiction treatment alumni associations came back into vogue with the rise of inpatient and residential addiction treatment programs in the mid-twentieth century but eroded during the heightened professionalization of treatment in the 1980s and 1990s. The past decade has witnessed a resurgence in patient-directed recovery support organizations associated with addiction

treatment—from the rise of consumer councils to revitalized or new treatment alumni associations or related services. Two people who have been key in this resurgence are Lorie Obernauer and Leonard Bade. In December 2012, I had the opportunity to interview Lorie and Leonard about their activities and about the founding of a new professional association, Treatment Professionals and Alumni Services (TPAS). Please join us in this conversation.



Professional Backgrounds in Alumni Services

Bill White: Let me just start by asking how each of you got interested in addiction treatment alumni services.

Lorie Obernauer: I was volunteering at CeDAR (Center for Dependency, Addiction & Rehabilitation, University of Colorado Hospital) in early 2007 and as a volunteer, I was doing

some work with patients at the Center and helping out in the marketing department. I was asked by the CeDAR Director if I was interested in starting an Alumni Services Program. CeDAR was about two-and-one-half years old, and the Director realized that there was a growing need for alumni support services. I agreed to do it although I really didn't know anything about what an Alumni Services Program might look like. My only experience with an alumni program was through my own involvement with my college alumni program. So, I started to look around to find other addiction treatment alumni groups as well as information that might help me set up such a group. That was when I started reaching out to other professionals who were involved in alumni services.

Bill White: And Leonard, how about you?

Leonard Bade: Several events triggered my interest in alumni services. In 1975, I did a 12-week internship at the Alcoholism Recovery Unit of the Menninger Foundation in Topeka, Kansas. I became fascinated! It was my first exposure to alcoholism treatment, and I became particularly interested in how the high post-treatment relapse rates could be reduced.

Then in 1983, I realized I also had the disease of alcohol and drug addiction and shortly after I became sober, I was involved with the first Alumni Program with the Betty Ford Center. At that point, we measured recovery at the Center in days, weeks, and months as the Center had not been open long enough for anyone to have more than six months of sobriety. I had a significant role with the Center's developing Alumni Program. I was their first President and with the help of some of the executives there—Dr. Joe Cruse specifically—we received the expectation that we were supposed to show up and be of service to other patients, take meetings to them, meet with them regularly, exchange contact numbers so that they had a network of recovery support when they returned home. I learned very early in my sobriety how to show up with love and service. We were all, of course, powerfully influenced by the example of Mrs. Ford and her hands-on approach to supporting the recovery of patients.

In 2001, I was asked to come back to the Center in a professional capacity as Vice President of Alumni Services. At that point, the center wanted someone who was more able to connect with the alumni, and I had a nine-year experience there that was phenomenal in introducing me to the role of alumni services in supporting the recoveries and health of our alumni.

Bill White: How did this subsequent collaboration between treatment professionals involved in alumni services get started at a national level?

Lorie Obernauer: Well, I started networking with professionals from other treatment centers. One person led me to another person and to another. As these introductions continued, a small group of us started talking on a regular basis by phone. As that circle grew, I suggested that we might try to formalize what we were doing and get more people involved. This small but growing group focused on what we were currently doing, what we were learning about building alumni services programs, and the challenges we were facing.

During that time, I also wrote an article that was published in *Addiction Professional* magazine in 2009 about the alumni program I was developing at CeDAR. There was a sidebar to that article inviting other alumni professionals to join a new group that was forming for the purpose of sharing and collaboration. I received many calls in response to that article, and about 30 of us continued talking on a monthly basis.

Bill White: Leonard, were you involved in that early group of thirty?

Leonard Bade: No, I met Lorie about six months into that process. In the spring of 2010, I was finishing my masters' thesis on peer support services in addiction treatment. I was quite interested in the role volunteers and peer support services could play in helping others who were going through or had completed addiction treatment. And I was transitioning from the Betty Ford Center and wanted to take what I had learned there to the larger treatment industry. So, when I heard Lorie had started this movement, I was extremely excited and contacted her, and we've been working together ever since.

The Founding of TPAS

Bill White: When was Treatment Professionals and Alumni Services officially founded?

Lorie Obernauer: It was in 2010 when Leonard joined and people began talking about the need for face-to-face meetings instead of phone calls. Those calls whetted our appetite for more direct communications. I asked for volunteers to work with me on a steering committee to figure out how that might happen. Leonard was one of the people who offered to work with me, along with Melanie Zapf from The Pavillion, Pam Rickard from Farley, Steve Campbell from Menninger, and Sherri Layton from La Hacienda. This group met in 2010 and 2011, and then additional people joined the group in 2012: Frankie Grundler and Miriam Meima from A New Path, Marvin Ventrell from Harmony Foundation, and Kim Murphey from Creative Care Malibu. Our intention was to determine how we might create an organization that would represent those of us who work with treatment center alumni. As the conversations evolved, we decided that we wanted to include others who worked with people in recovery providing any type of services, including volunteer services.

Leonard Bade: Our first meeting was in Fort Worth, Texas, in December of 2010.

Bill White: How many professionals and organizations are currently represented in TPAS?

Lorie Obernauer: Approximately 180 professionals and about 140 treatment centers and other organizations are involved.

Variability of Alumni Services

Bill White: I'm assuming there's a great deal of variability about how long these organizations have had alumni services. Is that correct?

Lorie Obernauer: Yes, some treatment centers that have been around for many years have always had some type of alumni program while others are just now recognizing the need for such alumni services. In the six years that I've been in the field, I've talked with people from new treatment organizations that are looking to provide alumni programs from the outset. More and more programs are recognizing the need for some sort of continuing support for their alumni.

Bill White: For our readers unfamiliar with alumni associations and alumni services, could you describe the range of alumni activities and services you see being provided by TPAS members?

Leonard Bade: There are a number of recovery support services being provided. And we're still discovering services that we weren't aware of as we bring people together. One of the most widespread and fast growing services involves peer support. This usually takes the form of volunteers supporting others in their recovery both in remote locations and within the treatment center. There are also formal support groups, which are sharing groups. Again, those could be local or they could be regional or national where people who have had a sustained, common,

shared experience can get together and share in their recovery experiences. Most of those are based on the format of a twelve-step meeting. There are also workshops and social gatherings, particularly those aimed at bringing people together at holidays. People come together as a community of shared experience, have a good time, and realize that they don't have to use alcohol or drugs to have a good time. And of course there are all the social media connections through the internet and telephone outreach that seems to be growing. This involves alumni members calling people when they return home from treatment at a set frequency to offer continued support for his or her recovery.

Why Alumni Services are Expanding

Bill White: Why are treatment organizations beginning to invest more resources in the development of alumni and other volunteer services?

Lorie Obernauer: Generally, the mission for an alumni program is to maintain a connection with the alumni and offer services that support long-term recovery. I think that an often unstated outcome is that alumni activities increase referrals to treatment. Alumni referrals are often the first or second or third best referral source for treatment organizations. And of course, some treatment organizations use their alumni database for fundraising efforts.

Bill White: Have TPAS members discussed the potential tensions between the vision of alumni-delivered recovery support services versus the institutions' marketing or fundraising needs? There would seem to be a risk of alumni groups interested in the former getting hijacked by the parent treatment organization to provide the latter.

Lorie Obernauer: At our first weekend together, there were discussions about that tension. This is becoming a bigger issue within alumni organizations, and I think we will have to keep asking ourselves why we want and need to stay engaged with alumni and the PRIMARY purpose for these contacts. That is a topic for sustained TPAS discussions.

Bill White: Leonard, what are your thoughts on this?

Leonard Bade: There are a lot of people in TPAS who serve in dual roles, including such areas as business development, marketing, and fundraising. This comes in part from treatment centers having tight budgets that require people to serve multiple functions. At the Betty Ford Center, alumni support was separate from the Development Department, and my job was purely to help people stay connected in recovery and connected to the Center. I think it was very beneficial to have that separate. That's actually why the Board of Directors decided they wanted someone who solely existed for that purpose. And with 140 volunteers, it had very significant roles of serving the alumni over a nine-year period. But we also found that alumni were a primary source of referrals. We did a poll at the Betty Ford Center in 2009 and found that those volunteers averaged 3.8 referrals each in the two years prior to the survey. And we found that volunteers not only gave their time, but they also gave their money. Helping also helped the helpers, with the volunteers maintaining an 80-85% continuous sobriety rate.

Bill White: You know, Leonard, I'm fascinated by the idea that at the Center you're describing, there's a clear separation between recovery support and the areas of marketing and fundraising, and yet the inadvertent outcome has been a high number of referrals as well as financial donations.

Leonard Bade: That's exactly what we found, but supporting our alumni required quite an investment. I traveled extensively over a number of years to maintain such connections and

when we showed up, people were clear that our primary purpose was supporting and celebrating their recovery.

Lorie Obernauer: I think what Leonard just said is really an important point. The Alumni Services at CeDAR are also separate from development and marketing. I think it is more often the case that the staff involved with the Alumni programs wear several hats. That can create a lot of confusion for the alumni as well as the person assigned to carry out this role. It would be wonderful if treatment organizations could have a devoted recovery support services person who didn't have to step into those other areas. It definitely confuses the message.

TPAS Activities

Bill White: Let's go back to TPAS as an organization. Could you review some of the major activities of TPAS since its founding?

Lorie Obernauer: We have had some of our members make presentations about alumni services at regional and national addictions-related conferences. These presentations review the purpose of alumni services, how TPAS came together, and what TPAS could do to offer support for development of alumni services within existing programs. For the past three years, we've provided opportunities for professionals from around the country to talk specifically about alumni services. I have also written a series of pieces on alumni services for *Addiction Professional* magazine. So, we are trying get out the word that TPAS is here and that our mission is to collaborate.

Alumni Services Research

Bill White: One of the areas that I was interested in having you reference, Lorie, was the work we've been trying to do to get some research conducted on the effects of participation in alumni supports on long-term personal and family recovery outcomes. Could you describe that briefly?

Lorie Obernauer: Yes. A few of us on the steering committee were quite interested in promoting research projects about alumni services: what is the status of alumni services around the country and the effects of such services. We really don't have a clear picture of the prevalence and scope of these services within the field. This interest led us to contact you, Bill, and you helped the group get connected to Paul Roman at the University of Georgia. He is now incorporating questions on Alumni Services programming through another survey project that he is currently conducting with treatment centers across the United States. Hopefully, in another six months, we will have a much clearer picture of the state of alumni programming in the United States.

Recent TPAS Summit

Bill White: It's interesting that alumni services have existed invisibly for many years in addiction treatment and we don't have a profile nationally of their history or current status. I know there's been a recent major gathering of TPAS that you were both involved in planning. Leonard, could you describe the meeting and how it was structured?

Leonard Bade: Sure, Bill, I'd love to. We surveyed our members some time ago and about 80% expressed a wish to network and learn from one another about how best to serve our alumni. I also start from the position that people long for connectedness, and knowing and being known in whatever community they're a part of, the association, the neighborhood, a mutual aid group. So, we created an experience that could create that sense of connection. Those who attended were complete strangers for the most part.

The event was designed to be distinctively different from any of the other conferences that are held in the industry. We wanted to have something that was intimate and different. First, we went to a retreat center near Loveland, Colorado, at a place called Sunrise Ranch. The environment itself was reflective of an experience we wanted to create. This created the kind of atmosphere we wanted and also reduced the costs of the event, which ended up being \$350 to \$400 per person and included three nights' lodging, three meals each day, and the conference fee. It's unheard of.

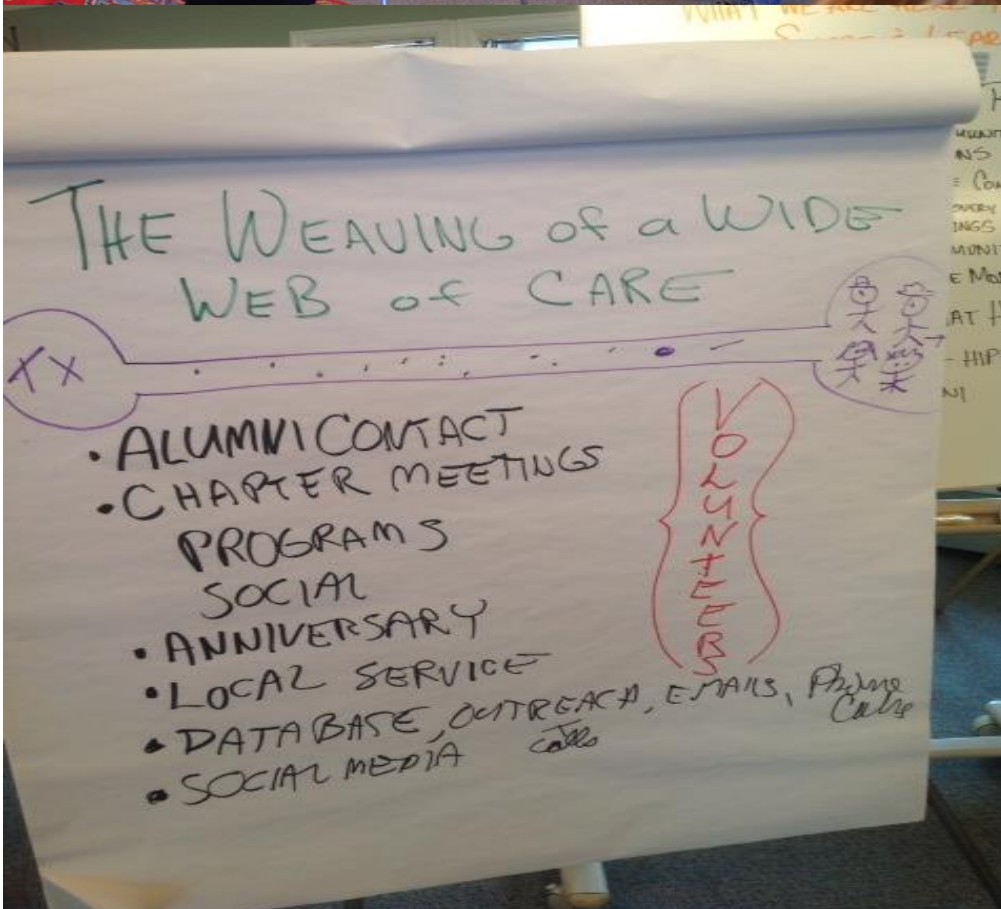


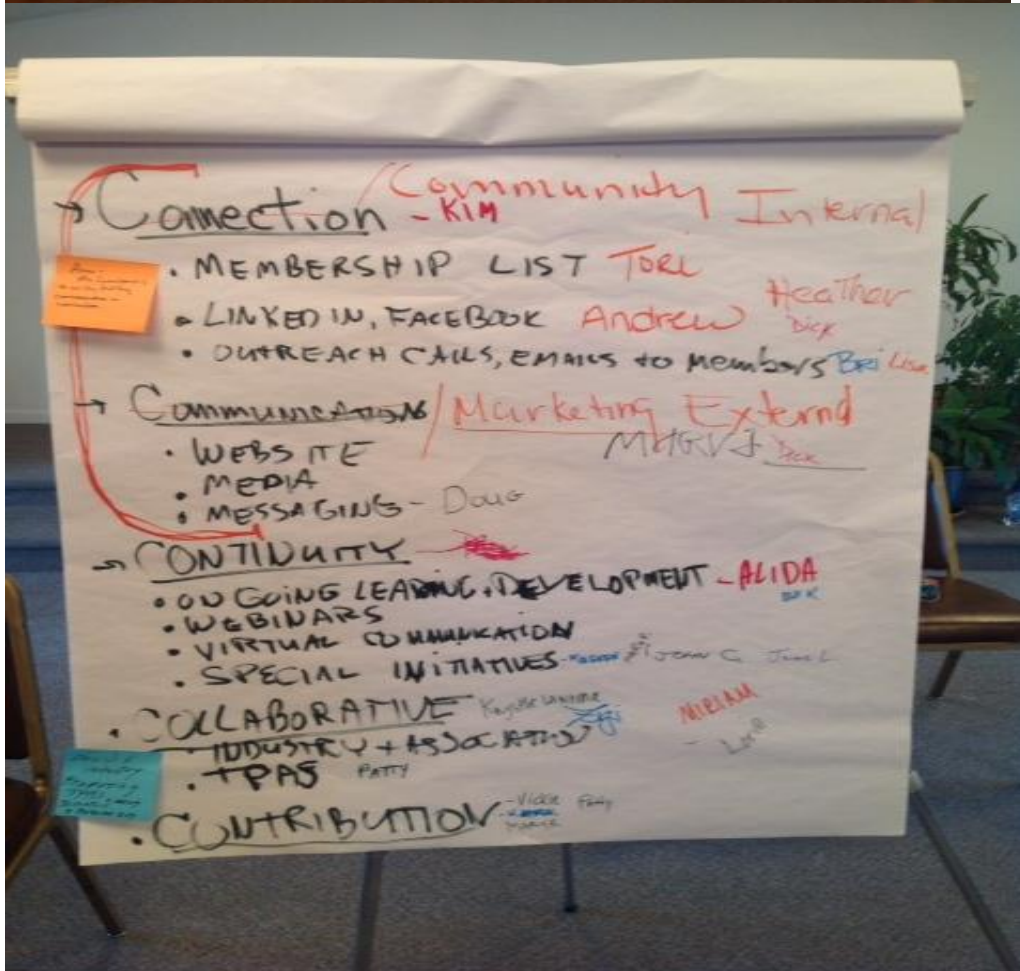
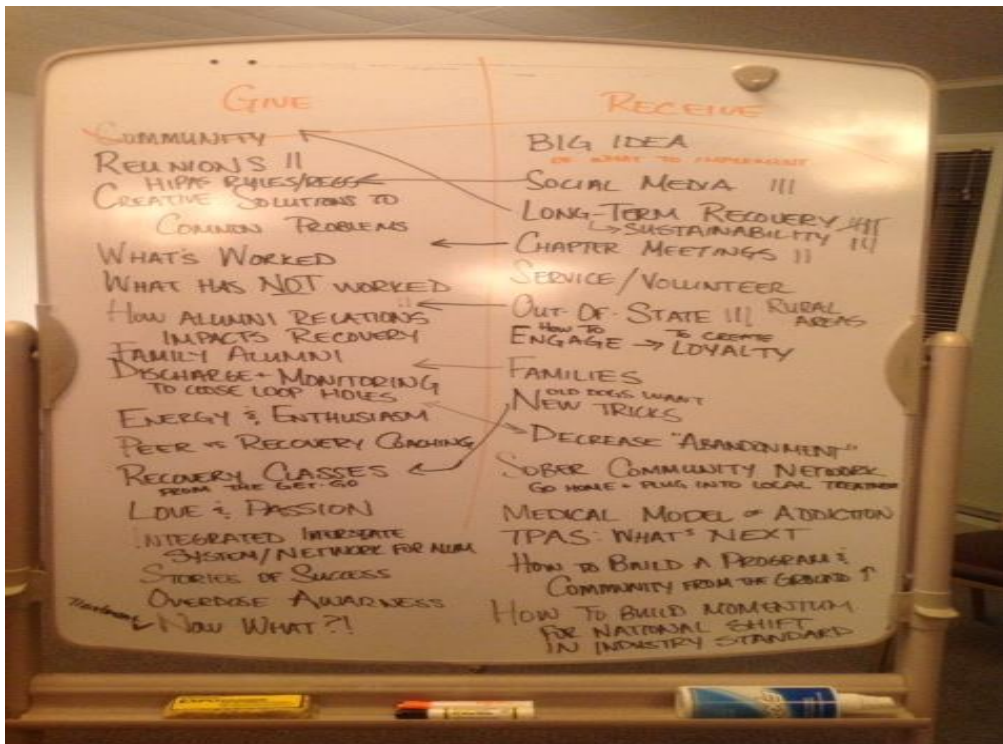
Second, most conferences have multiple speakers, PowerPoint presentations, and research things that are very interesting and useful, but we wanted a format that connected people on an equal basis. It was distinctively different than what we were accustomed to. I think, Lorie, we had what, about 30 participants? The alumni professionals, who are all on the front line, were the EXPERTS in the room.

Lorie Obernauer: Thirty-five people attended. We had representatives from for-profit and non-profit treatment centers as well as from the public and private sectors. Several attendees represented other organizations that provided recovery support services: coaching, life skills training, monitoring. And I'll steal Leonard's phrase that he used to describe it—it was an opportunity for people to come and be both teachers and learners. So, everybody there had something to share, and everybody had something they wanted to learn. And as Leonard already said, through the collaborative format that we designed for this meeting, we were hoping to model how we could use peer support with our own alumni groups.

Leonard Bade: We used meeting design principles based on some of Peter Block's work in community and the structure of belonging. (See *Community: The Structure of Belonging*, by Peter Block and *Open Space Technology: A User's Guide*, by Harrison Owen.) We focused on creating multiple conversations in small groups among the participants. The participants formed in groups of three and conversed around such questions as: What are the crossroads that we are faced with at this point in time? What things are contributing to your excitement or discomfort? What promises are you willing to make to yourselves, your organization, and to the

TPAS group to move forward? What are the gifts that you are bringing and what gifts do you hope to take away?





So in this design, Bill, we had six break-outs into small groups and everyone's voice was heard multiple times. That was basically the glue that brought this program together. We had at least twelve to fifteen open spaces in the design to respond to the specific needs of the members. We

also had a panel of CEOs/ Directors who discussed the need for and future of Alumni and Recovery Support Services in treatment organizations. Attendees had a chance to ask panel members for ideas on how to promote Alumni Department activities at their organizations and create a culture of recovery. The panel participants included: Steven Millette, Executive Director, CeDAR, Center for Dependency, Addiction & Rehabilitation; Bobby Ferguson, Founder & Director, Jaywalker Lodge; Dorothy Dorman, Chief Executive Officer, Harmony Foundation; and Patricia Henderson, Founder & Director, WINR, Women in New Recovery.

Bill White: That's a very unique structure. Lorie, I'm interested in your observations of how well that design worked.

Lorie Obernauer: Well, it was a fascinating process. We watched as the attendees got to know one another, started to bond and feel confident and excited to have the opportunity to be authentic, to be learners, to be teachers. It was just remarkable. At the end of the session, several people told us that they thought that it was the first time that they ever had a chance for both personal and professional learning at a conference. I have to thank Leonard for introducing me and TPAS to this type of process. I expect we will continue to use this format at future conferences because it turned out to be so successful.

Bill White: Leonard, you had this vision that people would be able to then replicate this experience within their own alumni groups. Did people walk out with the sense that that was going to be possible?

Leonard Bade: Yes they did, Bill. We don't know yet to what extent it's being utilized, but the questions we used to structure the meeting can be used in any environment and in any culture. A central theme of the conference was addressing the gap between the power and importance of the alumni effort but the reality that organizations have not yet committed the resources needed to really fulfill that potential. The process we used allowed us to move beyond that frustration to address what was possible as we moved forward. In fact, one of the central questions we discussed was, "What kind of future can you envision that's distinctively different from the past?"

Lorie Obernauer: We tried to be very intentional about pointing out what the process was as they were going through it. I think that it would be interesting to have a whole weekend to just look at the processes we used.

Growing Interest in Alumni and Volunteer Services

Bill White: Let me take both of you to a broader question. To what do you attribute this dramatic resurgence of interest in alumni and volunteer services in the past few years?

Lorie Obernauer: First, I think there is a much clearer understanding of addiction and recovery within the context of chronic care models. We are learning how addiction can be managed in ways similar to other chronic diseases. Second, I think that the public is more aware of addiction because of TV shows and media magazines. This has resulted in consumers taking more time to be informed when considering addiction treatment options. This new consumer is asking questions about outcomes and the availability of sustained support. Relapse occurs at very high rates and treatment organizations are being challenged to redesign services to address the traditional lack of support following discharge from treatment.

Bill White: Leonard, would you add any observations on this growing interest in alumni services?

Leonard Bade: Well, I think there are two other influences. One is that no one had simply stood to take leadership on the value of alumni services. This is what Lori did. No one had attempted to link these widely dispersed alumni groups into a community of shared support, and Lori did that. And second, once we started getting the word out about TPAS, CEOs and others from around the country began to contact us because they recognized both its need and its potential. While I am quite excited about this growing interest and the broader discussions of recovery-oriented systems of care, I am still concerned that what happens with post-treatment support remains an afterthought to most treatment CEOs. We have a long way to go with this work, and that will take getting more CEOs and clinical leaders to rethink the continuum of recovery support before, during, and following treatment.

Bill White: That leads me to another area of interest, which is the role of the professional in alumni associations and the tension between sort of staff-driven leadership versus peer-driven leadership of alumni associations. Is there a consensus among TPAS members about the ideal leadership structure for the alumni association?

Lorie Obernauer: I don't think that there is consensus on this. We are at this early point of development and most of our members are from treatment centers. They're hired to do this role, either part-time or full-time. These are professionally run alumni programs. I haven't talked to many people who have peer-run alumni organizations at their facilities. I will say that one of the biggest frustrations for the professionals who are doing this work in organizations is how to engage alumni to participate in the activities that they offer. One of the advantages of an organization like TPAS is that it provides a forum where we can discuss these kinds of issues.

Bill White: You have given me the vision that TPAS could evolve in ways that would actually bring alumni together with the professionals involved in alumni services and include clinical folks and the CEOs as well. TPAS could be a very interesting community in five years.

Lorie Obernauer: Yes, yes it could.

Bill White: Leonard, your thoughts on this?

Leonard Bade: Bill, I'm not certain we can yet accurately represent the views of the TPAS community on this issue. We have just not had time yet to address these kinds of questions in any depth.

Bill White: Yes, but what a great community environment you've created to wrestle with such questions.

Leonard Bade: Right, and that's why we need to come together. But my main emphasis is on peer support volunteerism because I've had the absolute experience of seeing the high impact of having volunteers who can work across the entire country who are devoted, who can't wait to get their next call to be of service, to meet that person coming out of treatment, to take them to their next chapter meeting, and to support their local chapter. And what a significant shift this is. I've witnessed powerful volunteer groups with peer governance and a peer-led board of directors. I believe the more emphasis that is placed on pure service rather than on governance and administrative detail, the more successful the volunteer/peer support effort will be. I've seen what can happen with a divinely inspired process through which people can practice these principles of building community with safety, trust, and intimacy that was just compounded month after month and year after year.

Personal Reflections

Bill White: I'm very interested in what you each feel best about in your own participation in TPAS. Lorie?

Lorie Obernauer: Well, I'm excited about the fact that we've created opportunities for people to come together in an authentic way and to collaborate and share without concern about profit margins or who has more clients. We focus on how we can best support long-term recovery for our patients. For example, we have even thought of a national TPAS Alumni organization so that I could call an alumni professional from somewhere on the East Coast and say, "I have a patient returning home to New York City. Can you help support him or her within your alumni group in New York City?" And people were very excited about that. Now I think it's a great vision and I'd love to see that happen. I think we have some steps to take, including some of the things Leonard mentioned regarding having our CEOs and clinical people all come together to be part of this. I think an effort like that would really inspire collaboration.

Bill White: Leonard, what do you feel best about through this experience so far?

Leonard Bade: Well, that is a great question. What I feel best about is that we are changing the narrative. I believe any significant change comes from changing the narrative within small groups of people and we are definitely doing this. We continue to ask powerful questions in small groups about alumni services. What does the future hold? What's getting in the way? What is our commitment to doing this? What are the promises we have? What are the gifts we're all gonna bring together to shift the treatment industry's focus to long-term recovery?

I am very committed to continuing this process that we have started. We've demonstrated and continue to demonstrate that people can go back to their alumni communities and their organizations and provide these kinds of supports via an army of volunteers providing mutual support at no cost but time. I think this could exert a profound influence on the design of front end treatment.

Lorie Obernauer: Let me just add to that. I heard from several participants who were at the TPAS Collaborative who have gone back to work and have started to implement some new programming and have made some changes based on what they learned. I think that's remarkable because I go to many conferences and meetings and think I'll go back and use what I have learned, but then somehow, it doesn't happen. TPAS members are still in touch with and supporting one another and are doing things differently in their respective organizations based on our mutual learning. I think the support they received from their peers encourages them to stay focused and to move forward with their own particular goals and projects.

Future of TPAS and Alumni Services

Bill White: It sounds like both of you see the future of TPAS really continuing to flow from this small group communication through which you can address questions about how long-term addiction recovery can be best supported for individuals and families. Is that correct?

Leonard Bade: Absolutely. These kinds of small group processes allowed participants to address their own needs but move beyond them for the benefit of the greater TPAS mission. We had twenty-five people sign up and commit who are now actively involved in the different committees that will help TPAS grow and fulfill its mission. So it's a very collaborative process.

Bill White: Is there literature about how to organize alumni services or their potential role in long-term recovery that you could recommend to our readers?

Lorie Obernauer: Bill, I would recommend that everybody read your Pathways book. I believe that a recovery curriculum for our alumni programs and services is imbedded in that book. The whole second half of the book is about recovery. But at this time, there really isn't a body of literature specifically on alumni programming. That is one of the reasons why I felt there was a need for TPAS.

Leonard Bade: I think those interested in alumni services would also find the papers on long-term recovery posted at williamwhitepapers.com very helpful.

Bill White: What is the best way for people reading this to contact TPAS about getting involved in future meetings?

Lorie Obernauer: For now, the best approach would be to contact Leonard or I directly at either leonardbade@gmail.com or Lorie.Obernauer@uch.edu. We also have a Communications Committee, so there will soon be contacts from that committee available.

Bill White: Wonderful. Leonard and Lorie, thank you for taking this time to talk about TPAS and your passion for alumni services. I'm in awe of the future possibilities for alumni services.

Leonard Bade: I appreciate the opportunity to share our experience, Bill. The years of seeing the positive outcomes of one recovering person working with another is deeply motivating. Your support has also been instrumental, and our hopes are high toward the future of TPAS and sharing the experiences of alumni support.

Lori Obernauer: And thank you, Bill, for everything that you've done and continue to do in the field.

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Appendix A

Leadership Group that Organized the Conference and continues to facilitate the growth

Lorie Obernauer - CeDAR, Aurora, Colorado

Leonard Bade - Integrative Recovery Solutions, Ft. Worth, TX

Sherri Layton - La Hacienda Treatment Center, Hunt, TX

Frankie Grundler - A New Path, Carbondale, CO

Miriam Meima - A New Path, Carbondale, CO

Kim Murphy - Creative Care, Malibu, Malibu, CA

Marvin Ventrell - Harmony Foundation, Estes Park, CO

Members Who Stepped Up after the Collaborative to Lead New TPAS Committees:

Each committee also has a "co-leader" from the original leadership group

Bill Kinloch
Vickie Bing
Andrew Reese
Dick Dillon
Krystle Lawrence

Participants at the 2012 TPAS Summit

Leonard Bade, Integrative Recovery Solutions
Vickie Bing, Benchmark Center
Alice Burkholder, Harmony
John Courshon, Gateway-Illinois
Tori DeGroot, Mission Pacific Post Treatment Center
Keenen Diamond, Living Sober
Richard Dillon, Innovaision
George Gatski, Central Recovery
Zigi Graham, Michaels House
Frankie Grundler, A New Path
Doug Hanshaw, State of Colorado
Anna Hawn, Shadow Mountain Recovery
Patricia Henderson, Women in New Recovery
Sue Hendrickson, Caron Foundation
Michael Holtzer, CeDAR
David Houke, MAP
Brianna Jones-Whelan,
William Kinloch, The Refuge—A Healing Place
Krystle Lawrence, La Hacienda
Heather Lister, CeDAR
Jaime Loera, Origins Recovery
Miriam Meima, A New Path
Kim Murphy, Creative Care Malibu
Lorie Obernauer, CeDAR
Lisa Parmenter, Addictions Recovery
Andrew Reese, Consultant
Mary Roufa, Rosecrance Health
Duke Rumely, Harmony
Alida Schuyler, Crossroads Recovery Coaching
Paul Scudo, CeDAR
Patrick Shaffer, Jaywalker Lodge
Kym Vasey, Gateway Foundation
Marvin Ventrell, Harmony Foundation

Appendix B

Additional Images from the Summit





