Focus 2.0

A Publication of The CAFÉ TA Center

Issue 20

What is the Focus 2.0?

The *Focus 2.0* newsletter highlights important issues in mental health, providing timely information on recovery, peer support, and the value of including people with lived experience in the mental health system of care.

Have a suggestion for a topic? Let us know!

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Share Your Voice to Contribute to National Organizing Efforts

This is a challenging time for everyone in the human services space, and the mental health recovery and peer support community is no different. Funding is unpredictable and uncertain, the future of public policy is foggy, and many people in the peer community live in fear that the progress that's been made to end stigma, develop alternative paths to healing, and build a system based on hope and shared humanity will be undone by a return to institutionalization and forced treatment.

What's to be done in the face of these challenges? This level of uncertainty calls for a united voice, national leadership, and solidarity among everyone in both the mental health and substance use recovery communities to provide a clear vision for the path forward. With the future unclear, now is the time for people with lived experience, peer supporters, advocates, youth leaders, peer support providers, and community members to come together to craft an affirmative vision that lets the public know what the recovery movement stands for, and advocates that recovery-based approaches to mental health that produce better results at lower

costs be a central pillar of our system of care for years to come.

Of course, that type of organized effort can be difficult to put together. The recovery community is very broad, and by definition includes many kinds of experiences. Recovery is about each person figuring out what works for them, and there's no "right way" to do it. That makes recovery effective and vital, but it also makes it difficult to bring people together and create broad agreement, especially when those representing the substance use community, families, and other stakeholders need to be included.

Nonetheless, given the unprecedented historical moment, leaders from different parts of the recovery movement are planning to come together to build consensus and develop a shared way forward. This January, representatives from the Alliance for Rights and Recovery, Youth MOVE, Faces and Voices of Recovery, the National Federation of Families, Disability Rights California, and Kiva Centers will come together at a retreat in Lenox, Massachusetts with an aim to "set a foundation for a unified course of action to promote rights and recovery for all people who experience mental health and/or addiction conditions—including families and youth."

While this in-person summit will only accommodate about 35 mental health and addiction peer leaders from across the nation, organizers are asking the entire recovery community to share their input. Each of the organizations involved has hosted community listening sessions to solicit input, two of which CAFÉ TAC has participated in directly.

Additionally, there is also **a survey that is open to all**. It asks for input on several key questions:

- What are the most important strengths and challenges in today's recovery and peer movement?
- What vision should guide our movement over the next decade?
- What strategies and actions are needed to unite our communities and advance rights and recovery nationwide?
- How can we uplift leadership, build solidarity, and protect our movement in an increasingly challenging environment?

What are your thoughts? Please share them!

Trying to change the course of public policy and make real change through a national organizing effort may seem intimidating, or even impossible. But with progress on recovery under threat and so much at stake for the future, this is a moment when every voice is truly needed.

We encourage you to participate in the survey here, and to step up to take part in making the recovery community stronger, building a shared vision, and helping to ensure that the path to recovery is open to people for years to come.

Once the Summit occurs, organizers will share the outcomes with the community, and CAFÉ TAC will be sure to share them with you.

Have questions about this organizing effort? Reach out to Luke Sikinyi from The Alliance for Rights and Recovery at lukes@rightsandrecovery.org.

Check Out The Peer Leadership and Community Engagement Series

CAFÉ TAC recently completed a four-part webinar series designed to empower people to develop their leadership and community engagement skills, with tools for leadership, collaboration, and sustainability.

Each of the four parts in the series discussed a different way in which people with lived experience can demonstrate leadership and build durable connections with their communities through thoughtful engagement and authentic connection.

- **Session 1** focused on how peer support workers and small organizations can create strong, sustainable communities, highlighting practical strategies for building mutual aid networks, strengthening collaboration, and ensuring every voice is valued in the recovery ecosystem.
- **Session 2** addressed the value of grounding leadership in integrity and respect, examining the role of ethics and cultural humility in peer support, exploring tools and real-world examples to help peers and organizations honor diversity, accessibility, and community care.
- **Session 3** guided participants through practices and frameworks for balancing responsibility with resilience, sharing strategies to prevent burnout, foster authentic leadership, and cultivate practices that sustain leaders and their communities.
- **Session 4** focused on coalition building as a tool for small recovery organizations, with guidance on how to form powerful partnerships, share resources, and amplify your voice through collective action, ensuring long-term impact for peer-led recovery.

Each session was also accompanied by practical tools and resources to help apply the concepts shared in the series to real-world situations.

You can find all of those resources, along with recordings of the four 90-minute sessions, on the CAFÉ TAC website at https://cafetacenter.net/join-cafe-tac-for-our-four-part-peer-leadership-and-community-engagement-series/.

Check it out, and see what you can do to refresh your leadership style and build essential bridges in your community!

Empowering Peer Entrepreneurs: A Training Series for Lived Experience Leaders

Sometimes, it can be a challenge for people with lived experience to find the right fit when it comes to the working world. Whether someone is looking for employment in the mental health system of care, or in any other setting, the expectations and way of doing business might not be a good match for their recovery.

Fortunately, there are lots of ways for people with lived experience to turn their expertise into a career while bringing the values of recovery and peer support to the table! Join us for a transformative four-part series starting in January to explore some of the options.

Our upcoming series is designed to equip individuals with lived experience of mental health conditions – including peer support specialists – with the tools, confidence, and strategies to explore entrepreneurship as a pathway to financial independence and community impact.

Through interactive learning and intentional community space, participants will:

- Gain practical knowledge and strategies to develop authentic, innovative entrepreneurial efforts
- Understand the importance of ethics, accessibility, and cultural humility in peer-centered business practices
- Explore how personal values align with professional ethics to create purposeful, sustainable work
- Engage in peer-to-peer learning, mutual support, and shared wisdom

Topics we'll be covering will include:

- Entrepreneurship for Peer Support Workers
- Life Strategy Mapping: Aligning Personal + Professional Purpose
- Ethics and Cultural Humility for Peer Entrepreneurs
- Entrepreneurship, Self-Care, and Maintaining Recovery

Step into your power, honor your lived experience, and discover what's possible when recovery, purpose, and entrepreneurship meet.

The series kicks off on **Wednesday, January 14th at 2 PM ET, with weekly meetings through February 4th**. Stay tuned for registration info in the New Year!

Take A Holiday Break with CAFÉ TAC

The holidays are intended to be a time of gathering, celebration, and renewal, and in a perfect world, that's how everyone experiences them. Of course, we all live in the real world, not a perfect one, so the holidays can also be stressful, difficult, or upsetting.

To help you manage the season, CAFÉ TAC invites you to take a pause to breathe and ground yourself. If you're feeling frenzied and overwhelmed, take a moment to listen to this Guided Body Scan Audio from our Integrating Mindfulness Practices in the Workplace series. It's a short, guided meditation that can help you return to yourself and find a place of calm in the holiday chaos. (If you're curious about it, the entire workplace mindfulness series is online at https://cafetacenter.net/join-cafe-tac-for-integrating-mindfulness-practices-in-the-workplace-a-four-part-series/.)

The holidays also bring families together, and sometimes that comes with additional stress and difficulty. If you'd like some insight on how to navigate that, check out the recording of our Family Mental Health: Navigating the Holidays webinar here. It can help you navigate the season with a bit more preparedness and a bit less stress.

Best wishes for the holiday season and the New Year from all of us at The CAFÉ TA Center!

Capacity Corner: A Column about Capacity-Building for Your Peer-Run Organization

CAFÉ TAC is pleased to share this feature, a column from CAFÉ TAC Training Coordinator John Ferrone on leadership challenges within peer-run organizations, where many advocates with lived experience direct their efforts to promote recovery and inspire change.

*This column's topic is **Managing Your Money: From Bookkeeping to the Treasurer's Report.***

Are you the Executive Director? Or the Treasurer on the Board? Maybe you're a staff member in charge of the budget? Some organizations manage their finances (i.e., their money) in house, and some have professionals do it for them, and some have a hybrid of those options. Regardless of how you manage your money, the bottom line (no pun intended) is that you need to be able to answer the following questions at any time:

Regarding Cash Flow, which is the money coming in and going out of your organization:

1. How much money is in our primary checking account that we use to pay bills?

2. How much money will be deposited into the primary checking account in the next 30 days?
3. How much money will be taken out of the primary checking account in the next 30 days to pay bills?
4. If #3 is more than #4, you have a "shortfall" (not enough money) in your cash flow—how will you address this?

Regarding Budgeting, Bookkeeping, and Reports, which is how you track and review the monetary transactions of the organization:

1. Do you know how much money you've budgeted to spend on various categories in the next 30 days, and over the course of the year?
2. Do you know how much money you've actually spent within the budgeted categories in the past 30 days, and are you over or under?
3. Have you entered all of the money-related transactions into bookkeeping software, or a pen and paper system, so that amounts can be calculated related to the budget?
4. Are you able to print a profit and loss statement for the month and year to date?
5. Are you able to print a balance statement for the month and year to date?
6. Do you know if your organization is currently positive or negative regarding its money, and what does it look like in 3, 6, 9 and 12 months?

Regarding Payroll and Taxes, which is how you pay your staff, withhold taxes, and pay taxes:

1. If you pay staff, do you withhold the proper employment taxes each paycheck?
2. Do you report the employment tax withholdings quarterly to the IRS, and make the payment to the IRS? And do you do the same for your State's quarterly employment tax reporting?
3. Do you file your annual Form 990 if you are a 501c3 non-profit?

First, don't let those questions intimidate you. Answering them, though, is a necessity. If you can answer the above questions, you're in good shape regarding the management of your organization's finances.

But what if you don't know how to do any of this? What if managing money is scary to you? Don't worry, you're not alone. There's a good chance, though, that you do a lot of the above things for yourself in your personal life and in your home. When's the last time you thought, "I might want to go to a movie this weekend . . . let me see if I have enough money"? All of the above questions are the same type of thinking, but for the organization.

The most important piece of the money puzzle is the budget. Have you taken time to list all of the monthly expenses you typically have, and compare them to the amount of money you receive each month? If the expenses are more than the income, well, that's a problem – you would have to cut expenses, or increase income, or both, otherwise you end up running out of money.

Here is a useful tool to help with the basic cash flow and future planning so you can avoid running out of money. This is a small image so that it can fit in this article, but if you click on it the link will open a Word version of the template tool that you can use and reuse each month. The numbers currently in the tool are just an example, and those are the numbers you change each month.

1. Coming into the month, we had this much available in our general checking account:	$5000
2. This month we received this amount of revenue or income:	$4200
a. Of the new revenue, this amount came from our contract.	$4000
b. Of the new revenue, this amount came from unique, extra donations	$200
3. Our total available funds this month were (1+2):	$9200
4. This month we spent this amount:	$4100
a. Of those expenditures, this amount was usual expenses that happen each month:	$4000
b. Of those expenditures, this amount was unique expenses that happened this month:	$100
5. At the end of the month, our cash balance is this amount (3 - 4):	$5100
6. Compared to last month, this is the difference (5 -1):	$100
7. We anticipate receiving this much new funding next month:	$4000
8. We anticipate this much in expenditures next month:	$4000
9. As of this report, next month we will be +/- this much for the month (7-8):	$0
10. By the end of the month next month, then, we anticipate our checking account balance to be this much:	$5100

If you'd like the Excel version, click here.

Back to the question about your comfort level with the money . . . you can always find a person who is good with this kind of information. Your Board has to have a Treasurer, and that person should be able to answer all of the above questions, and assist the Executive Director, if needed. Hiring a bookkeeper is highly recommended, too, because that person can enter all of the information required into accounting software to answer the above questions. There may be other resources in your community that can provide assistance. Quite often accountants will volunteer to be Board members and take on the role of Treasurer, although bookkeeping is usually something that needs to be paid for.

Above all, do not guess about the status of your money. Do not guess at the answers to the above questions. If you're guessing, you're at great risk of having to close your doors due to not having enough money.

Finally, there are more complex financial topics that may need to be addressed depending on your organization, and it is always good to speak with an accountant about those more complex topics. The questions and tool we've share here cover the basics, but if you need help with more complex issues, definitely seek it out.

Is there a leadership challenge you're facing in your peer-run organization or advocacy efforts? We want to hear about it! Reach out to us at cafetacenter@gmail.com with your question or comment. We will be happy to help, and your challenge might just be the subject of our next Capacity Corner column! (Anonymously and with your consent, of course!)

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