



12 Step Outreach Playbook

A Practical Guide for Building a Peer Support Program

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A.A. Preamble

Alcoholics Anonymous® is a fellowship of men and women who share their experience, strength and hope with each other that they may solve their common problem and help others to recover from alcoholism.

- The only requirement for membership is a desire to stop drinking. There are no dues or fees for A.A. membership; we are self-supporting through our own contributions.
- A.A. is not allied with any sect, denomination, politics, organization or institution; does not wish to engage in any controversy, neither endorses nor opposes any causes.
- Our primary purpose is to stay sober and help other alcoholics to achieve sobriety.

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Why a 12 Step Outreach Program

There is a long and esteemed history of Alcoholics helping other Alcoholics. It is the backbone of the A.A. credo and an essential part of the recovery process. Going back to our humble beginnings, Bill W's fateful visit to Dr. Bob was the first 12 Step Outreach; a fellow alcoholic, having received the gift of divine inspiration, shared his experience, strength and hope with another alcoholic that he too would benefit from the priceless gift of serenity.

It is in the spirit of our origins and the fundamental knowledge that when an alcoholic, deep in his disease, reaches a point where he is willing to seek help, there is little better help that can be afforded than that of another alcoholic's understanding, compassion, and willingness to help a fellow.

History of 12 Step Outreach Programs

Over the years, there have been countless attempts to provide 12 Step Outreach solutions for our fellow alcoholics. Some of these attempts have been successful and some have not. Due to the ever-changing climate of the medical profession, overarching institutional liability concerns, and the nature of drug and alcohol treatment approaches in the consciousness of society, a consistent and measurable effort by the A.A. community to impact acute alcoholism has never fully taken hold. Until now.

Greater Seattle Inter-Group (GSIG)

In the past few years, a program has developed by the Greater Seattle Inter-Group (GSIG) that has forged new ground. Taking advantage of optimal conditions within the ranks of service and with a grit and determination to see that their concept of a 12 Step Outreach program deserved to see the light of day, the GSIG has built what appears to be a sustainable methodology for cultivating a strong relationship with their local and well regarded regional hospital, Virginia Mason, and for the better part of past three years, their efforts have made a real impact in their community of suffering alcoholics.

The Virginia Mason Story

As a regional hospital with a busy emergency room environment, Virginia Mason sees its fair share of regular acute alcohol cases. Many of the patients admitted under these conditions are no stranger to their ER. What was once a hopeless situation for the hospital staff, thanks to the efforts of GSIG, there is now a solution that can be employed with a high degree of success, helping to provide a unique mix of personal development and long-term care for the chronically afflicted. Though there are no guarantees with the 12 Step Outreach efforts between Virginia Mason and GSIG, the benefits for the staff and the opportunity of full recovery for the patient creates a win-win situation that is heralded as a success by all. A copy of the Virginia Mason Story is provided in the form of a downloadable link at the end of this document. See the [Resources](#) section for details.

A Lucky Break for District 23

As many of us know, Higher Power works in mysterious ways. Whether it is fate, luck, or guiding forces beyond our comprehension and control, we recognize that a power greater than ourselves is available to us if we are willing to believe. It is with this in mind that District 23 (Santa Barbara) made the kismet cut and found itself with an opportunity to not only learn about the success of the GSIG and Virginia Mason, but to work closely with those A.A. members who founded the program and helped it to realize the light of day. This newfound zeal for 12 Step Outreach work is well underway and this document posits a simple, yet effective set of guidelines for creating, managing, and sharing the collective work begun by GSIG and its success with Virginia Mason.

A Higher Purpose

GSIG's generosity in mentoring District 23 has fostered a potent and infectious energy that has allowed for the organization of a formal 12 Step Outreach Committee Program, operating under District 23's Cooperation with the Professional Community (CPC) and bringing together members of Inter-Group and H&I, so that we can assist in cultivating a positive and productive relationship with our local medical institutions. We encourage you and your District to take advantage of the generous efforts of all involved and to join in this amazing project so as to a powerful and proven way to carry the message, and to help other Districts benefit from the value that a well structured 12 Step Outreach Program can bring to the many alcoholics still suffering in our communities.

CPC as the General Service Committee of Choice

Due to the nature of the CPC mission, to cultivate and maintain a positive relationship with professionals, administrators, doctors, and the many folks that facilitate care to our alcoholic community, CPC is an ideal Committee to facilitate the efforts of a 12 Step Outreach Program. For more information on the CPC mission and purpose, please reference the CPC Workbook provided as a downloadable link at the end of this document. See the [Resources](#) section for details.

Forming a 12 Step Outreach Committee

Once the decision has been made by the CPC Committee, the District, or however the local decision is made to undertake a project like the 12 Step Outreach Program, the first thing that will need to happen is the formation of a sub-committee, responsible for the inception and ongoing management of the project. Members of the Committee do not need to be part of General Service. They can be any A.A. member that has a desire to support the cause. It is recommended that committee be made up of individuals familiar with organizing and running projects, as well as building teams, however, in lieu of that, a good group of motivated A.A.s will suffice nicely.

Committee Service Positions

Like any A.A. group, the Committee has several service positions that help facilitate the work of the Committee. Below are the defined responsibilities of the various service positions that have been defined to date:

Chair

The 12 Step Outreach Committee Chair is responsible for running the 12 Step Outreach Committee meetings, including providing a meeting agenda, ensuring that all voices are heard, and following the bylaws as they are written. The Chair is responsible for reporting Committee activities and initiatives to the District via the CPC Chair. It is not required that the 12 Step Outreach Committee Chair be the CPC Committee Chair, however, for the first term, it is recommended that the CPC Chair also be the 12 Step Outreach Committee Chair to ensure that the activities of the Committee follow the mission of the District's CPC charter. The Chair does not cast a vote on Committee motions unless it is to break a tie. A sample format for an agenda is provided later in this document.

Co-Chair

It is the responsibility of the Co-Chair to provide logistical support for the 12 Step Outreach Chair. In the event that the Chair is unable to preside over a meeting, the Co-Chair will assume the role of meeting arbitrator. The Co-Chair normally has the ability to cast a vote on Committee motions, unless serving in the capacity as of the Chair, due to an absence or vacancy.

Secretary

The Secretary is responsible for recording the business of the Committee. They will keep records in a written fashion by any means most convenient to the Secretary during the course of the meeting, however, all meeting notes must be converted into a publishable format for ease of reproduction, review and audit. A sample format for keeping minutes of Committee business is provided later in this document.

Treasurer

Responsible for taking and tracking any 7th Tradition monies collected at Committee Meetings as well as any donations made in part or whole by individual A.A. members or A.A. groups or A.A. service organizations such as Inter-Group, the Treasurer shall keep books that properly organize all incomes and expenses. At an interval no less than monthly, the Treasurer will provide a report of current accounts to the Committee as well as to the District upon request. Requests made by the district shall come through the CPC Chair and a reasonable time shall be allotted for the reporting of accounts, but shall not exceed two weeks from the time of request.

Panel Coordinator

Once the business of the Committee has reached a level where 12 Step Outreach services will be provided, it will be the job of the Panel Coordinator to organize and manage the ongoing efforts of panel activities and the activities of the individual panel members. This will include but not be limited to introducing interested A.A. members to panel activities, training panel members, and ensuring that panel members have been added to any technological communication methodology being utilized by the 12 Step Outreach Program by coordinating with the Technology Lead.

Technology Coordinator

It is the job of the Technology Lead to provide the necessary expertise and support for Committee activities as they relate to 12 Step Outreach Program efforts. This will include but not be limited to facilitating the management of a Website, email, and any digital solutions that the Committee deems necessary to perform its mission objectives.

Sample Committee Meeting Agenda

Agendas can vary and should always be appropriate to the specific needs of the Committee. Below is a numbered list that has proven to work well as a method of organizing the focus of the Committee business. The list can be copied into an online or desktop word processing application to allow for a greater level of specificity for each item as needed.

1. Meeting Opened with Serenity Prayer at:
2. Welcome Committee Members and Visitors
3. Chair Report
4. Co-Chair Report
5. Secretary Report
6. Treasurer Report
7. Panel Coordinator Report
8. Technology Coordinator Report
9. Old Business
10. New Business
11. Announcements for the Good of A.A.
12. Next 12 Step Outreach Meeting
13. A.A. Birthdays Since the Last Committee Meeting
14. Close with the Responsibility Declaration at:

Sample Committee Meeting Minutes

With the Sample Committee Meeting Agenda in mind, utilizing the same numbered list as the means for organizing the Secretary notes is highly encouraged. A copy of the meeting agenda can be provided by the Chair to the Secretary prior to or after the meeting as a means of transcribing the notes taken during the meeting. By following this method, there is a high likelihood that no stone is left unturned in the note transcription process and should insufficient notes be taken, the specific item can easily be identified by any member that was present during the meeting, making the efforts of the Secretary greatly simplified.

Sample Committee Meeting Schedule

In an effort to be consistent with the 12 Step Outreach Program efforts and to maximize the potential participation of A.A. members interested in the cause, it is highly recommended that a regular Committee meeting be held on a normalized day, time, and location of each month.

An example of this would be: The 1st Wednesday of each month, from 6-7pm at Central Office

Sample Committee Bylaws

Bylaws are the governing instructions for any body (Committee) that wishes to conduct itself in a consistent and professional manner. When in doubt, check the bylaws. Bylaws generally outline the scope of authority of the Committee, the way in which specific matters are handled, such as the election of officers, and how official business of the Committee will be handled, such as interacting with other A.A. Committees and Groups. Though it is not necessary to have Bylaws to conduct the business of a Committee, if time is taken to create Bylaws and an issue or question should arise as to handle a situation, Bylaws serve as the foundational business rules for how a Committee will conduct itself. A copy of Sample Bylaws are provided in the form of a downloadable link at the end of this document. See the [Resources](#) section for details.

Technology Plan & Execution Checklist

To ensure that the goals of the Committee are met, a technology plan should be developed that will support the needs of the Program. A complicated plan is not required. Rather, a simple plan that can be 100% enacted is far better than a plan that hopes to accomplish an ambitious goal, yet is unlikely to succeed. When planning, follow the rule of K.I.S.S. (Keep It Simple Stupid). The following topics cover the fundamental elements that should be considered in any technology plan.

Setting Up a Simple and Effective Technology Stack

Once a plan is established, it is wise to determine that the technology chosen is accessible to and usable by the vast majority of A.A. members that will be participating in the 12 Step Committee Program efforts, with an emphasis on the Panel Members. They are the front lines of the Program and it is incumbent on the Technology Coordinator to ensure that they can participate in the effort. To assist with this task, it is highly recommended that a technology poll be taken of panel members mobile devices, as this is the likely tool that will be used by all Panel Members for the purpose of being alerted to and responding of 12 Step Outreach panel activities.

What is a Technology Stack

A Technology Stack is the sum of the various technology tools (software and services) used to provide a solution. It could be comprised of email, SMS (text messaging), Website, or specific applications that are required to perform the prescribed activity.

Managing Your Technology Stack

Regardless of what technology is determined to be appropriate, it is important to keep in mind that others in the future will be in positions of responsibility for managing whatever is implemented, therefore it is highly encouraged that simple and clear documentation be produced to provide a perpetual resource for managing the Technology Stack. It will be important to regularly perform a system review to make sure that inactive users are removed or turned off and that services that have been implemented are still functioning as initially intended. If changes are needed and or made, updates to the documentation of the change or proposed change will provide a useful record for others when a review of systems in the future are made.

Testing Your Technology Stack

Once you have chosen your Technology, take time to test out the solution with various members and their personal communication solutions. This may include: mobile devices, desktop computers, tablets, etc.

Sample Information Security Policy v.1.1

The development of an Information Security Policy is necessary to let any that will be participating within a 12 Step Outreach Program, that their information will be kept safe and secure. Be sure to provide a copy of the Information Security Policy to the Technology Coordinator so that it can be added to the Website for easy access for any individuals that would like to know what the policy is. The Sample Information Security Policy can be downloaded [here](#). A copy of the Information Security Policy used by District 23 is also provided in the form of a downloadable link at the end of this document. See the [Resources](#) section for details.

12 Step Outreach on the Internet

Though it is not required that a District provide their specific 12 Step Outreach Program details on the Web, utilizing the Internet as a platform for communicating the scope of the 12 Step Outreach Program is an ideal means of keeping a 24/7 brochure of the various benefits and activities of the Program. With the information always available, access by A.A. members, the community at large, and the administrative management of the various medical facilities that the 12 Step Outreach Program is intended to reach is made simple and easy.

Establishing a Landing Page for 12 Step Outreach Information

Once a decision has been made to publish a 12 Step Outreach Program on the Internet, there are many ways to go about making the information available. A custom URL (such as: www.our12step.com) can be purchased by the district for the express purpose of housing the Program, or an existing URL (such as: www.District23Area93.org/12StepOutreach) can be utilized that provides space for the Program details. In addition, there are many free blog service platforms that can be utilized to create content for the Program. Regardless of the method utilized, collaboration with the Technology Coordinator and or Webmaster for the District is highly encouraged to ensure an optimal implementation.

Establishing an Email for 12 Step Outreach Contact

Whether or not a Website is utilized for the Program, a contact email is needed for communication between institutional staff the Panel Coordinator(s). This is the primary methodology for communicating that a patient has given consent to have a 12 Step call occur. The email account that is created *only* to serve for the express purpose of handling the direct request and response of communication from medical professionals requesting that a 12 Step Outreach effort occur. Therefore the email account belongs to the 12 Step Outreach Committee and not to an individual. It will serve as the master record for all requests and should be reviewed and audited for communication interaction quality control purposes. The Panel Coordinator and any Committee Members that express interest in paying attention to the communication chain should be given access to the account.

Establishing Communication Protocols for 12 Step Outreach Efforts

Email, SMS (text messages), phone calls or contact forms on Websites are all possible with the program. There is no right way, however, it is well to consider the impact of the various methods.

Email

As previously discussed, email is a time-tested methodology that is familiar with nearly all professionals and non-professionals. It also serves as a convenient record management tool for the 12 Step Outreach Committee.

SMS (Text Messages)

Though a highly convenient method of communication, SMS is not ideal for official communication management. This is because the communication is typically device specific (iMessage between iOS devices aside) and therefore lives on a personal device and does not easily serve the greater purpose of being a transparent communication methodology that can be reviewed by the Panel Coordinator and or Committee Members responsible for ensuring a high quality of service by the 12 Step Outreach Program. That said, where SMS is extremely useful is for communications between the Panel Coordinator and Panel Members in the

dispatching of service requests, directions, notes, and or updates related to a 12 Step Outreach activity.

Phone Calls

In the same vein as SMS communication, phone calls have a limited use as a tool for tracking communication, however, serves just fine for direct person-to-person communication between the Panel Coordinator and Panel Members or Panel Member to Panel Member.

Contact Forms

If a Website is utilized, it may be decided that a Contact Form be enacted for the purpose of communicating the need of a 12 Step Outreach request. Contact Forms can often be configured to send an email to a specific email address or to a group email address. Depending on the services utilized to facilitate the Contact Form, the information gathered can also be compiled in a database for later use in communicating 12 Step Outreach Program updates and progress.

Be thoughtful in selecting a contact form service to avoid issues created by inefficient user interactions. It is less than ideal if the user experience is clumsy in nature, requiring the user to provide redundant information every time they use the form, reducing the likelihood of use, thus negatively impacting the intended benefit of the intended purpose.

Forming a 12 Step Outreach Panel

The core of the solution provided by a 12 Step Outreach Program is the 12 Step Outreach Panel. A Panel is made up of volunteers from the A.A. community that have a desire to serve in the capacity of human contact for individuals that are suffering from active alcoholism and are currently under the care of a medical facility for a limited amount of time and have expressed a willingness for contact by members of A.A.

Attracting Panel Members

A simple and effective way to attract Panel Members is to coordinate with Inter-Group and General Service Members. A flyer, card, or other easily distributable notice of the 12 Step Outreach Program's need for Panel Members is a time-tested method of bringing awareness to the A.A. community within a District. The notice should include details such as: where to meet, when to meet, who to contact and whatever method of contact is preferred by the Panel Coordinator.

Who Should Be On a Panel and Why

Any A.A. that is able to conduct themselves in a consistently professional manner is qualified to participate as a Panel Member. Unfortunately, this means that not every A.A. is ideally suited to be a Panel Member. It is up to the discretion of Panel Coordinator to determine whether or not an A.A. is appropriate as a Panel Member.

Panel Member Training

The Panel Coordinator is responsible for training all Panel Members on the established protocols for each medical institution that the 12 Step Outreach Program participates with. In an ideal world, there would only be one protocol for all medical institutions, however, this may not be the case for a number of reasons, therefore, where required, specific training will be included where applicable.

Supplies

To be a Panel Member, it is necessary to be able to send and receive communications as prescribed by the Panel Coordinator as well as be able to arrange transportation to-and-from the medical facility where the 12 Step Outreach activity has been requested. The 12 Step Outreach Committee is not responsible for supplying the tools, equipment, or transportation required to fulfill this requirement.

Literature Packets

The 12 Step Outreach Committee may choose to acquire and or provide Literature Packet(s) to Panel Members to be distributed during 12 Step Outreach activities. The specific items included in a Literature Packet is at the discretion of the Committee. It is suggested that literature focused on the medical professional be used, as it has been written to speak directly to their expressed concerns.

Institutions

How to Build a Successful Relationship with a Medical Institution

Building a successful relationship with a Medical Institution is essential for the long-term success of any 12 Step Outreach Program. There are countless ways that this can be accomplished; however, the following are specific activities that will encourage success at any stage of the effort.

Getting to Know Your Local Medical Institution

The first step in building a relationship is to get to know your Local Medical Institution. This can be accomplished by looking them up online, talking to anyone who is familiar with the operation, including: doctors, nurses, and staff. Another great way to get to know the Institution is to physically visit the location. Where is it? What condition is/are the building(s) in? What kind of a reputation does it have? Are they known for anything in particular within the community? Essentially, do your homework where possible to get a full idea of what kind of a business / service they provide and what they are known for, good or bad.

Who Are the Stakeholders

After you have gotten a general education on the Institution, it is well to get to know who the stakeholder are within the organization. Who are the Board Members, senior staff, social organization relationships, and or political supporters.

Getting to Know their Website

Fortunately, these days, most of this information is available on the Internet. Nearly all Medical Institutions have a public-facing Web presence that tells the world their mission statement, services provided and any other relevant information that they are attempting to promote.

Understanding their Mission Statement

An Institution's Mission Statement is a powerful tool in understanding how they see themselves in the world. The Mission Statement can be practical, philosophical, and or overly generalized. Knowing how they think about their Mission can provide a useful insight into who they are and what solutions they more likely than not interested in supporting.

Understanding their Core Competencies

If the Medical Institution has core competencies, such as psychiatric care, a surgical center, gene therapy or any number of other solutions, it is well to consider if the 12 Step Outreach Program is naturally aligned with their Core Competencies. Regardless, it is always better to know the mindset of the Medical Institution being considered for a 12 Step Outreach Program.

Understanding their History with A.A.

Does the Medical Institution have a history with A.A.? If so, what is it? Do they currently coordinate with A.A. through Hospitals & Institutions (H&I) or some other A.A. function? If so, has the experience been positive or negative? What is it like today? These are all good questions to consider as a means of preparation for making contact.

Identifying Medical Institution Champions

Now that you know as much as you can about the Medical Institution as needed to begin to reach out, it's time to Identify Medical Institution Champions. Champions are individuals that work with, for or are otherwise influential within the decision making process of the Medical Institution.

What Makes a Champion

Champions are typically willing administrators, doctors, nurses, spiritual advisors, counselors, or others that for one reason or another recognize the value of providing a connection for patients suffering from acute alcoholism and contact with A.A. during the patients stay within the institution, which may be short-lived. Champions may be A.A.'s themselves or have a family member or close personal relationship that has been affected by alcoholism. Whatever the case, they personally or professionally sympathize with the cause and are willing to allow the hand of A.A. to exist within their operation.

How To Find a Champion

A good way of identifying a champion is to first start within the A.A. network. Getting the word out through Inter-Group and General Service into the rooms of A.A. is a wonderfully organic means of reaching out within the fellowship. You may be surprised by the response.

Begin with These Champions

Experience has shown that there are two Champion categories that have yielded the best results. They are: 1) Director of Social Services, and 2) Nurses.

Director of Social Services

Within most Medical Institutions, the Director of Social Services is the executive gatekeeper for programs that can and will be facilitated within the facility. They are responsible for ensuring that appropriate and effective services are offered to patients and typically report directly to the CEO and or Board of Directors. Depending on the size and scope of the Medical Institution, the Director of Social Services may be difficult to pin down for a discussion about Peer-to-Peer programs, however, they are typically very receptive to such programs and thus, the effort to make a positive connection with this critical resource is strongly encouraged.

Nurses

The lifeblood of care within a Medical Institution are their Nurses. Nurses are the "boots on the ground" and are part of the program of care for every patient within the facility. Because of this fact, nurses are often over burdened with the responsibilities of care and are open and receptive to *any* tool that can assist with providing positive care for their patients. Additionally, Nurses are crucial in the feedback loop for management, which provides a priceless opportunity for building a positive feedback loop within the Institution. It is for this reason that forging relationships with the Nursing staff is strongly encouraged.

Reaching Out

Once a Champion is identified, it is advisable to compose a professional communication that introduces the idea of the 12 Step Outreach Program initiative and an invitation to discuss the matter further and

or to make a connection to someone that might be better suited for the discussion. The communication method chosen should be geared towards the preferred method of the recipient if possible. Some people prefer Email, some prefer physical mail and others do best with a phone call / voicemail.

Sample Email

Crafting of a professional email can be daunting for some and easy for others. Though there is no exact science to it, keeping the message simple and to the point is often a productive approach. The Sample Email can be downloaded by clicking [here](#).

Sample Letter

Similar to an Email, a Letter should speak to the essence of the reason for the communication and provide a straightforward description as to the reason for the writing. The Sample Letter can be downloaded by clicking [here](#).

Sample Voicemail

In the same vein as and Email and Letter, Voicemail is best if it is brief, to the point, and provides a reply phone number for easy contact. The Sample Voicemail can be downloaded by clicking [here](#).

Dealing with Rejection

Rejection is a natural part of any effort to introduce an individual or an organization into something that they are unfamiliar with. The key is not to take it personally. You are likely to get many more “no” and “we are not interested” responses than “yes” and “we are interested” responses, unless there is already a foundation of a relationship or a prior introduction has been made and or interest has been previously expressed.

Staying Positive and Maintaining Momentum

By not taking rejection personally, and recognizing that a 12 Step Outreach Program may be an entirely new concept for the Medical Institution or individual that you are attempting to contact, it is encouraged that keeping a positive attitude about what they Program can and will eventually offer to the Medical Facility is worth every effort made to encourage the adoption of the Program. Keep your chin up, discuss your challenges with your sponsor, the Committee and or at meeting level, and have faith that when it is meant to happen, it will.

Organizing Your Contacts

During the process of identifying individuals to contact, it is encouraged that the contact information gathered be organized in an easy and shareable way. If possible, the use of an electronic format is preferable. There are several free services (such as: Google or Open Office) that allow for the creation, storage and collaboration of notes, documents and or spreadsheets.

How Often Should You Reach Out

The frequency of contact effort is not an exact science, however, there are some general guidelines that can help to avoid being an annoyance in the minds of those you wish to create a positive relationship with.

First Contact

Leaving a Voicemail, followed with an Email and or a Letter is just fine. The Voice mail should acknowledge that an Email and or Letter will be sent as a follow up. When an Email and or a Letter is sent, it is a good idea to reference the Voicemail attempt (such as: "I am following up on the Voicemail I left you earlier today."), however, it is not a requirement.

Second Contact

It is recommended that several days be allowed for the individual to process the First Contact request. After between three to five business days, a follow up contact attempt is perfectly reasonable.

All Other Contacts

For subsequent contact attempts, letting a week or two pass encouraged. This will act as a reminder, without it becoming a nag. Additionally, an in-person contact attempt can prove to be highly beneficial. When making in-person contact, be prepared to leave some form of printed material with whomever you interact with (such as a secretary, supervisor, etc...) with your direct personal or service information on it to facilitate easy access to you.

Setting Up a Meeting

After a successful Contact is made, the next likely step is to setup a Meeting. This can be done via Email, over the Phone, via SMS or through a calendar invite on a mobile device or desktop calendar application or some combination of the aforementioned methods.

Provide an Agenda

Once a Meeting day/time has been agreed to it will serve to provide an Agenda. An Agenda only needs to be a simple outline of the topics that will be covered. No particular order is required to the topics.

Sample Agenda

1. Introductions
2. What A.A. Is
3. What A.A. Isn't
4. 12 Step Outreach Program
5. 12 Step Outreach Workflow
6. Questions & Answers
7. Standard Institutional Guidelines
8. Key Institutional Stakeholders
9. Preferred Consultative Approach
10. Next Steps

Where to Meeting

A useful approach for determining where to meet is to allow the Contact to choose. Because you are requesting that they meet and discuss the 12 Step Outreach Program, the courteous act would be to give them the option of selecting the location and time that is most advantageous for their schedule.

What to Wear

As an official representative of A.A., it is encouraged that professionally acceptable attire, matching or exceeding work environment of your Contact. If they wear a suit and tie as a function of their job role, then an equivalent attire is most appropriate. If they wear jeans and a T-Shirt, business casual is acceptable. The point being that one should wear professional attire, regardless of whether or not the Contact is expected to be dressed professionally; they are not being evaluated, A.A. is.

How to Act

Needless to say, anything less than professional mannerisms should be avoided at all costs. The Contact will likely never forget the interaction that they have with the chosen representative of the 12 Step Outreach Program that they first meet, so it is well to make a good first impression.

Following Up a Meeting

Should the Meeting go well, and a follow up meeting needed to further the efforts of the relationship building process, the best time to schedule the follow up is during the last item on the agenda, "Next Steps." The Meeting material will be freshest in the mind of the Contact at this point and it is well to schedule a follow up Meeting, whether or not one will be needed. In the event that the Contact does

not want to commit to a follow up or they are unsure if one will be needed, do not force the matter. A follow up call or email is a suitable solution and is perfectly serviceable as a replacement. It is advisable to avoid any pressured action during interactions with a Contact. Working with A.A. should feel comfortable and easy.

Presentations

Scheduling Presentations

Once approval has been given to begin the formal introduction of the 12 Step Outreach Program to the Medical Institution, it will be necessary to schedule a Presentation. This can be done via Email, over the Phone, via SMS or through a calendar invite on a mobile device or desktop calendar application or some combination of the aforementioned methods.

How to Prepare for a Presentation

To encourage a positive reaction to a Presentation, preparation is highly advisable. This can be accomplished in a number of ways (see below), and will greatly aid the presenter in being confident in the content of the Presentation as well as an edge in carrying the message to the professional community as a whole.

Know Your Audience

A valuable step in preparing for a Presentation is to get to Know Your Audience. This can be accomplished by requesting a list of names, titles, and or groups that will be attending the Presentation from your Contact. This information will help to determine the focus of the presentation by giving insight into the areas of likely interest to be covered during the Presentation. If the Presentation is going to be attended by Doctors and Nurses, the message will be somewhat different than if the Presentation is going to be attended by Administrators, and or a combination of the two. Other groups might also be present, such as Faith Advocates, Counselors, Psychiatrists, or any number of other potential stakeholders. Knowing Your Audience ahead of time is always useful.

Provide an Agenda

Once a Meeting day/time has been agreed to it will serve to provide an Agenda. An Agenda only needs to be a simple outline of the topics that will be covered. No particular order is required to the topics.

Sample Agenda

1. Introductions
2. What A.A. Is
3. What A.A. Isn't
4. 12 Step Outreach Program
5. 12 Step Outreach Workflow
6. Questions and Answers (Q&A)
7. Next Steps

Making Presentations

Though there is no right way to make a presentation, there are more and less effective ways of communicating the information that is to be presented. When considering approach, there are a few key concepts to keep in mind. They are, 1) know your subject, 2) make eye contact, and 3) project your voice.

Knowing Your Subject Matter

Confidence comes from the self assurance of being thoroughly familiar with all of the materials to be presenting. A simple review of the Subject Matter may not be enough to provide that confidence, so consider practicing the presentation with fellow A.A.s on the Committee or with anyone willing to serve as an audience. Getting comfortable with the Subject Matter of a presentation will do wonders in helping to effectively carry the message.

Making Eye Contact

It is not always easy, but when Eye Contact is made during a presentation, the audience invariably feels more connected to the Subject Matter being presented. The audience also feels like the information being presented is more personal. Don't worry if making Eye Contact does not feel natural at first, it takes practice.

Projecting Your Voice

The third pillar of an effective Presentation is to Project Your Voice. Because the nature of the 12 Step Outreach Program is a peer-to-peer undertaking, the Information transfer occurs best as a person-to-person or person-to-group setting, which requires an effective use of verbal communication. Voice Projection is a skill, not unlike Knowing Your Subject Matter and Making Eye Contact, therefore, It is highly encouraged that thoughtful attention be given to the act and feedback be requested from a trusted audience

What to Wear

As the presenter, you will be the center of attention for a minimum of one business professional and likely many more. With that in mind, and as part of Knowing Your Audience, dress in a manner that will put provide a beneficial image to A.A., while providing a comfortable viewing experience for those attending.

How to Act

Maintaining professional conduct, language, and a grateful attitude will serve to leave a lasting impression on the administration, staff, and any other group that is participating in the Presentation.

Sample Presentation Materials

The following Presentation Materials were originally developed by the Greater Seattle Inter-Group (GSIG), with the intent of being adopted by other Areas and their Districts. They can be downloaded, modified, and publically shared as deemed appropriate by the Committee.

A.A. Facts Handout

Describing what A.A. is and or isn't, can be a challenging proposition for anyone. The A.A. Facts handout focuses in on answering those questions for the professional in a straightforward manner. This is a single page explanation of what A.A. is and what A.A. isn't. The A.A. Facts Handout can be downloaded by clicking [here](#).

Peer Support Visit Workflow Presentation

A lot of work was put into developing a solid Workflow that identified how a Medical Institution would identify, process and communicate a request for a 12 Step Outreach request. The 12 Step Outreach Process Workflow provides a clear and effective method of supporting the Medical

Institution's needs as well as the necessary interaction with A.A. for the dispatch and response of Panel Members. The Peer Support Visit Workflow Presentation can be downloaded by clicking [here](#).

A.A. Hospital Presentation

The A.A. Hospital Presentation is a comprehensive overview of A.A.'s history, what A.A. is and what A.A. isn't, the Peer Support Visit Workflow, as well as how A.A. and medical professionals can and do cooperate. The document can also be downloaded by clicking [here](#). A copy of the A.A. Hospital Presentation used by District 23 is also provided in the form of a downloadable link at the end of this document. See the [Resources](#) section for details.

Why Staff Education

Staff Education is an extremely useful means of keeping the administrators, nurses, doctors and other boots-on-the-ground personnel that interact with patients that might qualify for a 12 Step Outreach interaction up to speed on why the Program was developed and how it works as an effective and cost-free resource in the fight against chronic alcoholism.

Holding a Staff Education Session

A Staff Education Session is essentially the same as Making a Presentation, but it can be expected that there will be far more interaction with the individuals involved because they are more often than not, the direct contact with the alcoholic and likely have experience in dealing with their symptoms and course of treatment.

Provide an Education Panel

It is highly encouraged as part of any Staff Education Session that a panel of A.A.'s be present, ready to share their experience, strength and hope with the Medical Institution Personnel.

Who Should be an Education Panelists and Why

Not every A.A. is best suited to be an Education Panelist. Though not a requirement, individuals that fulfill this specific Panel participation, will ideally have experience of having been treated by medical professionals as part of their recovery and may have been the direct result of a 12 Step Outreach effort. Additionally, because the Panel Members selected will be required to interact with the attendees during the Q&A portion of the Education event, Panel Members should be considered based upon their ability to reliably conduct themselves as positive examples of the benefits of their A.A. experience.

What to Wear

Professional attire is highly encouraged at all times during Education Sessions.

How to Act

To ensure that A.A. and the 12 Step Outreach Program is as effective as possible in carrying the message, it is suggested that professional conduct be strictly adhered to.

Identify a Counterpart

After the program has been introduced, approved, and the educational process has been completed, it is important to develop a single point of contact within the Medical Institution to act as the point of Coordination between the 12 Step Outreach Committee and the Panel Coordinator. The individual identified will provide a direct line of communication between the Committee, Panel Coordinator and the Medical Institution on behalf of the Medical Institution. They will work directly with the Committee and Panel Coordinator on all matters relating to the Program.

Schedule Regular Review Sessions

To help insure that the 12 Step Outreach Program is providing benefit to the Medical Institution, their staff, and other Stakeholders, including the Panel Members and ultimately the alcoholic patient population that the Program is intended to serve, scheduling of regular Review Sessions with the Medical Institution Counterpart is essential. These Sessions will perform best if they are not too often and not too infrequent. A suggested interval for the sessions is once per quarter, or approximately every three months. A set day and time are preferred, however, allowing the Medical Institution Counterpart to define the most beneficial scheduling is helpful to all. It is well to ensure that the Review Sessions are convenient and appreciated by the Counterpart rather than being challenging and difficult to accommodate.

Staying Connected with Stakeholders

In addition to the Regular Review Sessions, it is often beneficial to stay Connected to Stakeholders that are outside of the Medical Institution Counterpart's direct influence. These may be individuals that are part of the community (such as: Government officials, Board Members, the Media, other A.A. Areas / Districts, etc.) that have a vested interest in the Program's development, management, and overall effectiveness.

Collaboration

Working with Your Area

The CPC Chair for the Area is a valuable resource in understanding what is happening outside of the direct influence and decision making process of the District where the 12 Step Outreach Program is being developed. Area Chairs are a wealth of knowledge and wisdom on the greater activities of A.A. as a whole and can bring to bear support, understanding, and ideas that are gathered from other Areas across the region.

Working with Other Districts

As the Program and its influence grows, Collaboration with neighboring Districts can greatly enhance the effectiveness of the 12 Step Outreach Committees direct influence. Creating a healthy working relationship with Other Districts will encourage an enhanced community of like-minded A.A.s who see the merits of the 12 Step Outreach Program's potential.

Share Findings

As data is collected on the Program and information insights are gathered, Sharing Findings with other Stakeholders will go far in the cultivation of support for the 12 Step Outreach efforts. Collaborating with the Technology Lead to develop a method of storing and reporting on the activity numbers (such as: number of requests received, number of requests responded to, average response time, etc.).

Keep Website Up-To-Date

After grooming the information and putting into a useful form, both categorical and visual (such as: spreadsheets, graphs, reports, presentations), the resource files created up on the 12 Step Outreach Website for easy access by Committee Members, Panel Members, Medical Institution personnel, the A.A. community, and the public at large. By ensuring that the Website is Up-To-Date, accurate and timely information is provided to any interested party, reducing the likelihood of unintentional misinformation.

Evaluation

Make Notes on Progress

Within the 12 Step Outreach Committee efforts, including the Panel Members and any interaction with A.A. and outside organizations, it is advisable to keep Notes on Progress made. Notes taken at the time or immediately after often provide invaluable insight upon later reflection and review.

Identify Lessons Learned

As an extension of the Notes on Progress activities, insights gleaned from the information gathered are highly valuable to Identify Lessons Learned. The premise behind Lessons Learned is as a means of assisting the Committee, Group or Individual in avoiding activities, that upon hindsight, were determined to be generally ineffective or that produced less than desirable effects and outcomes. The Lessons Learned then therefore provide future A.A. servants with a guide on what might not want to be done, based on the understandings that were learned.

Strengths Weaknesses Opportunities Threats (S.W.O.T.) Analysis

A S.W.O.T is a powerful tool in assessing where an Individual, Organization, or Project is at and what the benefits and issues are that might be leveraged, modified, or simply acknowledged. For a useful understanding of how to conduct a S.W.O.T. Analysis and to see various methods that can be used, click [here](#). A copy of the S.W.O.T. Analysis link used by District 23 is provided in the form of a downloadable link at the end of this document. See the [Resources](#) section for details.

Sample Document & Process Links

The following links are links to samples of documents and processes.

- [Sample Bylaws](#)
- [Sample Information Security Policy v.1.1](#)
- [Sample Email](#)
- [Sample Letter](#)
- [Sample Voicemail](#)
- [Sample S.W.O.T Analysis](#)

Presentation Materials Links

The following links are to presentation materials.

- [A.A. Facts Handout](#)
- [Peer Support Visit Workflow Presentation](#)
- [A.A. Hospital Presentation](#)

GSIG Links

The following links provide insight into the journey of the Greater Seattle Inter-Group.

- [The Virginia Mason Story](#)
- [12 Step Calls](#)

A.A. Links

The following links are to official A.A. publications that can assist in developing a deeper understanding for Committee Members, Panel Members, and any other interested parties, whether or not they are members of A.A..

- [PI Kit](#)
 - [PI Workbook](#)
 - [A.A. Guidelines – Public Information](#)
- [CPC Kit](#)
 - [CPC Workbook](#)
 - [A.A. Guidelines – CPC](#)
- [A.A. Fact File](#)
- [A.A. Guidelines – Internet](#)
- [A.A.'s Legacy of Service](#)
- [Anonymity Online](#)
- [Estimates of A.A. Groups and Members](#)
- [FAQ About A.A. Websites](#)
- [How A.A. Members Cooperate With Professionals](#)
- [Speaking at NON- A.A. Meetings](#)
- [Understanding Anonymity](#)

Contact Information

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