

FLORIDA PEER NETWORK RETREAT
JULY 29 AND 30, 2005
Canterbury Retreat Center
Oviedo, FL

Meeting Summary

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Introduction:

On Friday July 29 and Saturday July 30, 2005, a group of 20 people with psychiatric disabilities met in at the Canterbury Retreat Center in Oviedo Florida (near Orlando) to plan the development of a statewide organization that will represent the interests Florida citizens who are mental health services consumers (list of participants is attached). The meeting was called to respond to recent state and federal initiatives to transform the mental health system. This transformation is defined by a recovery orientation that is designed to be more responsive to the needs of persons with mental illnesses.

Florida's Department of Children and Families (DCF) has begun to develop a systems transformation plan and the Florida Substance Abuse Mental Health Corporation has taken the lead in applying for a federal Mental Health Systems Transformation Grant. DCF has also announced its intention to create an Office of Consumer Affairs (OCA) and has requested input from consumers in establishing this office. These and other activities across the state highlighted the need for an organization of mental health consumers that could represent the diverse interests of individuals and groups across the state of Florida.

Gayle Bluebird, of the Advocacy Center, (the funding source for the retreat), led the planning for this meeting and served as facilitator for the proceedings. She assembled participants with the organizational skills and experiences needed to respond to a state level systems improvement effort. She explained that each of the participants met the criteria of being the director of a consumer-run organization, or served as major leaders, locally, state, nationally. Many persons have presented at national conferences and have been involved in national initiatives. The group prepared for the meeting through a series of e-mails and a July 15 conference call. This report summarizes the discussions, findings, key conclusions, and next steps.

Friday July 29, 2005

Ice Breaker Session (Leah, Gayle, Bill)

(all morning session)

Each of the attendees introduced themselves and the organizations they represent. Participants also described their hopes for this meeting and for the development of a statewide consumer network in Florida.

Why Assemble a Statewide Organization and Why Do We Need One?

Gayle Bluebird facilitated a discussion about the primary goal of a statewide consumer network. There was general consensus about the need for this network and for a coherent consumer voice in the state of Florida. The following are the major themes expressed during the discussion:

- Any effort to transform Florida's mental health system cannot be authentic without the full participation of mental health consumers.
- Terms such as recovery and transformation need to be more than "buzzwords", and need to reflect fundamental changes in current mental health policy and practice.
- The consumer network should develop a strategy for relating with the mental health system and should ensure that services have a direct and positive impact on people with psychiatric disabilities.
- The consumer network needs to be recognized as a viable organization within the state.
- The plan for transformation has created an important opportunity for the development of a consumer network.
- The consumer network needs to represent the diversity of voices of consumers in the community, including the full range of consumer organizations, and individuals and families.
- The group expressed great confidence in the skills/abilities and organizational experience of the consumer community in Florida, but expressed concern about the short time frame provided by the state for responding. Planning for the transformation should reflect a process that is both thorough and thoughtful.
- Some participants expressed that the consumer network should not accept government funding in order to ensure its independence.

Jim Winarski of the Florida Mental Health Institute at the University of South Florida (USF) was introduced and provided a summary of the Substance Abuse Mental Health Corporation (SAMHC) meeting that was held at USF on July 21 and 22, 2005. The meeting focused on Florida's plan to transform the state mental health system, consistent with the finding of the President's New Freedom Commission. At the SAMHC meeting, Cindy Holland of the Department of Children and Families presented an overview of the plan. Jim presented draft definitions of recovery/resiliency, practice guidelines, and a plan for implementing systems change/improvement. The network received a draft copy of Jim's draft prior to this meeting and will expect to be fully involved in the process of subsequent revisions. Jim expressed his view that there was now an important window of opportunity for the development of a statewide

consumer network and that authentic state transformation could not take place without this network.

Organizational Development

Four breakout work groups focused on four tasks critical to the development of the consumer network as a viable organization: name and mission statement, incorporation as a 501C with bylaws, steering committee/membership definitions, and long/short term goals. The following is a summary of the report provided by each work group:

I. Name and Mission Statement (Nancy)

The large group discussed, voted on, and approved the following name, mission statement, web URL, and tag line:

- *Name:* Florida Peer Network, Inc. (Note: Per Clint: Peer can be an acronym for Persons Engaged in and Entering Recovery – no agreement established regarding acronym).
- *Web URL:* Floridapeer.net (work had already been done to check for availability of name and web—Toni, Sally).
- *Mission:* The mission of Florida Peer Network, Inc. is to promote recovery, quality of life, advocacy, education, mutual support, peer directed services, and participation in mental health policy design.
- *Tag Line for Stationery:* The Florida Peer Network, Inc. is an independent organization of and for persons with psychiatric disabilities. (Leah presented the group with a stationery letterhead and logo she had designed for approval).

II. Incorporation 501C (Neil)

Neil Bush, DBSA, read from the 501C legal document. He reported that David King, attorney, charges \$500 for preparing the application. The by-laws will need to reflect the requirements described in the 501C document. Neil pointed out that state organizations have different requirements than individual programs.

III. Steering Committee and Membership Definitions

Section 4, Article 3, of California Network By-Laws were used a reference in the discussions of the work group. The following are the main themes from the discussion of the work group presentation:

- Establish a 5-member board
- Implement parliamentary decision-making using Robert's rules.
- One voting member will serve as legislative advocacy coordinator.
- The network will plan for a membership drive and should focus on establishing a membership that reflects the diversity of individuals in the state. The District offices have mailing lists that could assist with reaching potential members.

- There should be three categories of membership:
 - Voting member (self-identified persons)
 - Associate membership
 - Non-Voting member (organizational membership)

- Key activities should include legislative advocacy, education, technical assistance, and peer support.

IV. Short and Long Term Goals (Jana, Lead)

The work group presented and led discussion of the following short and long term goals that will provide direction for the activities of the network:

Short Term Goals (6 months to a year)

- Announce our existence to consumers and others – develop a brochure.
- Incorporate and organize.
- Identify point people.
- Secure contracts with DCF for statewide peer training.
- Educate consumers on legal rights.
- Strategize for maximum impact.
- Recognize that we need to be assertive and to expect full participation, rather than asking permission.
- Next meeting to be scheduled for November.

Long Term Goals

- Assess needs
- Political advocacy/education
- Train consumers to do advocacy
- Network: consumers, mental health system, and general public.
- Need strategy for public relations, media relations, press releases.
- Collaborate with other agencies
- Civil rights enforcement
- Housing strategies
- 2006 conference
- Work for a mandate that a percentage of contract monies be designated for consumer services.

Wrap up at 5:25 PM.

Saturday July 30, 2005

Gayle started the day's activities at 9:00 AM by giving a recap of Friday's activities. Gayle also gave a history of previous attempts to develop a statewide network in Florida and other States. She explained that this effort is unique because we have targeted people who have been statewide leaders on consumer issues and presented at national conferences to act as leaders for

the development of this group. All of the people participating in this meeting are accustomed to working together and have the skills and experience that is needed to develop a viable organization. The group represents a good start but needs to seek greater cultural diversity.

Gayle indicated that the criterion for selecting participants may not have been used in other states and may be the key to our starting out well and sustaining progress over the long term. The Florida Peer Network will be unique in that it provides a place for all groups and interested individuals to come together with the purpose of having a place at the table when key decisions are made. The focus will be on influencing policy rather than on education, clarifying how the state organization is different from NAMI Client Council or DBSA. She said that it will be important for people to understand that we are not setting up a competitive organization, but a coalition that can include all organizations and individuals to create a strong united contingency of consumers.

Tom Lane talked about his experience with “Dream Day” at a Santa Fe conference and provided a writing journal for the group to document their experiences of the network meeting.

The primary focus for Day Two was on the development of by-laws, making recommendations for the state Office of Consumer Affairs (OCA), and on defining next steps for action after the meeting.

I. By-Laws Group Report (Neil, Toni)

- Toni Beard reviewed draft by-laws for incorporation that were adapted from a group in California.
- The group voted on and unanimously passed the motion that the by-laws be accepted as a rough draft subject to review. The document will be edited by the group and attached to the meeting report.
- There was agreement about the need to elect interim officers to get an official application started. They will hold office for a period of 6 months. The following persons volunteered to serve as officers on an interim board and were approved unanimously in a vote by the large group:

Clint Rainer – (District 1)
Bill Schneider – (District 10)
Patrick Hendry – (District 8)
Tom Lane – (District 15)
Jana Spalding – (District 10)

- There was unanimous agreement that these 5 people should meet as soon as possible to determine the role they will play on the board (Chair, Co-Chair, Secretary, Treasurer, member at large).

II. Office of Consumer Affairs

The group received a copy of a position description for the Office of Consumer Affairs (OCA) for review and comment from the Department of Children and Families (DCF). The review discussion was guided by a set of core principles and discussion items.

Tom Lane agreed to collect notes from the reviews and to craft a job description along with a rationale for the revisions. He will send an electronic copy to each participant and indicate a date by which input must be provided. Tom will let DCF know that the revision is in process. The goal is to submit the revised job description to DCF by August 15.

Core Principles for OCA

1. Consumers must support planning and hiring of staff for OCA and have active involvement in developing job descriptions and hiring.
2. Staff must be self-identified consumers. (Needs to be part of the advertisement of the position –as defined in a federal manual on developing OCAs)
3. OCA must be part of senior management. (Person treated as equal – should answer to the Assistant Secretary)
4. OCA must have adequate support. (administrative, staff, and emotional support)
5. OCA should serve as systems change agent. (Empowered to change the system – policies.)
6. OCA position does not relieve senior management of responsibilities.

Items for Group Discussion

The following is a summary of the discussion themes for each of the OCA items:

1. Job description (review and comment)

- NASMHPD has book on creating OCA's (used as reference during the meeting) that provides a valuable reference. Gayle read from segments of this manual and some of the language will be incorporated into the revised position description.
- Experience and education requirements for OCA position (after discussion by group) should be as follows: Masters and 2 years experience or Bachelors + 4 years experience or 5 years experience and no degree. The group was in unanimous agreement on this experience/educational requirement. Many qualified people have not been able to be hired for positions because of educational requirements that do not reflect an understanding of the histories of people with mental illnesses.
- Second paragraph – position should be responsible for planning and development of curriculum (not assists with).
- No single office can represent people with mental illnesses. The person in this position is acting primarily as a liaison to represent the interests of people with mental illnesses.
- Address diversity – OCA position needs to represent the full range of needs/interests in the community.
- Should be nationwide search, but preference given to Florida candidates.
- Need to specify peer and advocacy organizations in paragraph two.

- Need to measure desired outcomes and systems change.
- Position should focus on the transition of consumers from service recipients to tax payers.
- Focus of OCA position should be on competencies and not personal qualities (page 2).
- Office should have capacity to contract out technical assistance (TA) and to develop TA and Resource Center
- FPN acknowledged in T.G.
- DCF/Comp continue to fund OCA.
- No prior experience required should be removed.
- OCA position should serve not only people who receive services from DCF but “citizens of Florida with mental health needs.”
- The group voted to use the word consumer and agreed that there may be more effective terms we can use in the future, such as recipient.
- Person should have leadership experience and the ability to advocate/deal on all levels of the system.

2. Proposed salary and implementation date

- The group expressed general concern about the short time frame given to the network to respond to the development of this position and to the degree to which transformation activities have already proceeded without consumer participation.
- Salary of \$60,000 is insufficient to cover travel and benefits, and should be increased by about one third.
- Person in position will need 25 to 30K to cover expenses and insurance. Should be funded at least to 100K.
- Should develop a budget line for travel.
- OPS position can be demeaning. Position should be FTE, not an OPS position.

3. Placement of OCA in State bureaucracy

- OCA office should be located in DCF and report to Assistant Secretary level. This is consistent with the practices with other states.
- OCA should not be tied to the Transformation grant – money needs to be set aside even without grant funds. Funds for starting position may come from transformation grant.
- Should be an on-going position.

4. Relationship of Florida Peer Network to OCA:

- The Florida Peer Network should be involved in the hiring process, including interviewing committees, decision-making, and approval of candidate.
- Action Council on OCA
- Placement within DCF allows the position to effectively function as an “insider/outsider bridge”.
- OCA should work with AHCA, DCF and other state agencies to support consumers with mental health concerns.

5. Self-disclosure requirement for applicants.

- The group was in unanimous agreement that applicants for the OCA position should be required to self-disclose a psychiatric disability. (Note: Further discussion on finer points will still be made following work of steering committee/board)

I. Next Steps: (immediate)

1. Dawn to send contact information
2. Tom to write revision of job description.
3. Thank you letters.
4. Submit input on by-laws.
5. Interim board will select positions.
6. Announcement of Network to be completed by Jana and submitted to Dawn.
7. Plan for relating to media.
8. Press kits
9. Gayle's position: Administrative Coordinator.
10. Jim Winarski to submit meeting summary.
11. Next conference call: Mid August.
12. Funding plan for Network.
13. Steering committee membership.
14. Schedule meeting in Tallahassee in Mid August/submit results/respond to DCF requests.
15. Respond to the Mental Health Summit.
16. Send e-mail to our organizations.
17. Inform lawmakers of Network progress.
18. Interim board will be the clearinghouse of all network information.
19. Website development – David Money (See MH Can Alaska)
20. Supporters
21. Stationery
22. Send list of strengths, skills, and abilities.

Supporters: Bill

The group identified a short list of the following individuals who are identified as already supportive of the Florida Peer Network.

1. GingerLerner-Wren
2. Representative Eleanor Sobel
3. Pat Curtis
4. Pat Robinson
5. Ellen Piekkelkewicz
6. Lucy Hadi
7. Aleisa McKinlay
8. Dana Farmer
9. Pat Kramer

(There are others that will be added)

Parking Lot Issues:

Time did not allow for a detailed discussion of the issues listed below. They are included here as a reference for planning future conference calls and meetings.

1. Funding for Florida Peer Network
2. Hotlinks on e-mail
3. District office mail-list involvement in sending out flyers
4. Grant writers: Sally, Dianne, Nelson have experience.
5. Send e-mail with resume and skill list for compilation.
6. Grant reviewer – Bill has experience.
7. Add tag line to the network name.
8. Website development
9. Create announcement letter
10. Funding for peer specialist.
11. “Natural” supports: Not paid and may not be trained.
12. Patient right cards.

The meeting adjourned at 4:00 PM with acknowledgement of having achieved the primary goals for this meeting and with an expectation that the Florida Peer Network, Inc. will become a significant driver in the development of policies and practices that effect people with mental illnesses in the state of Florida.

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List of Participants

Angela Vickers
Anne Rollyson
Annette Popovich
Bill Schneider
Carolyn Wilson
Clint Rayner
David Money
Dianne Cote
Donna Jenkins
Gayle Bluebird
Jana Spalding
Jean McPhaden
Jeffrey Ryan
John Massolio
John Nelson Kull
Leah Krumme
Michael McNally
Nancy Fudge
Neil Bush
Patrick Hendry
Sally Clay
Sandra McQueen
Sherri Trahin
Susan Lang
Tom Lane
Toni Beard