



Strategic Plan

2021-2024 Strategic Plan

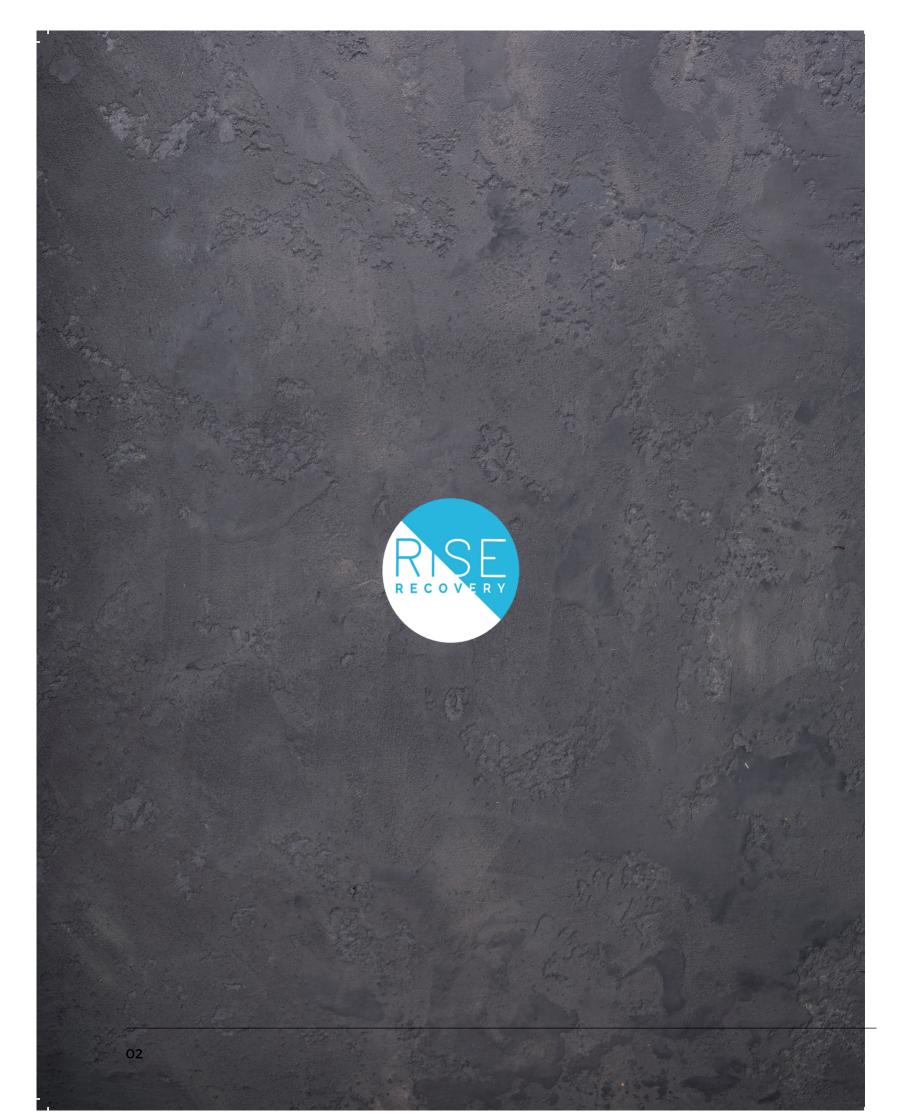


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CEO, Evita Morin

For over 40 years, Rise Recovery has been a sanctuary for recovery, providing care and comfort to the body, mind and spirit. Even through monumental change, we have maintained a steadfast focus on the youth, young adults and families we serve, as we help them overcome the challenges faced by drugs and alcohol. This is the very core of our mission. It is who we are.

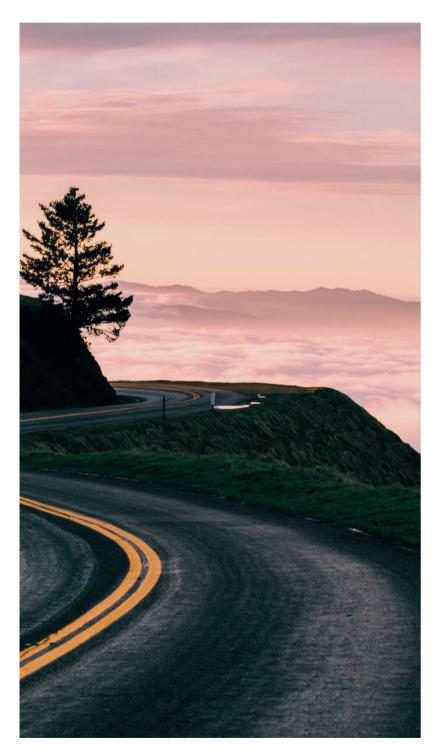
On the journey of recovery, change is the only constant, and the pace of change continues to accelerate. There has never been a more critical time to plan for the future; to lay down an aspirational path that ensures continued success for years to come.

We are pleased to introduce you to Rise Recovery's 2020-2024 Strategic Plan – a bold and clear plan that outlines where we're going and how we'll get there. We envision an always accessible community filled with strength, hope, and love in which all can reach our full potential, finding joy and purpose in our sustained recovery. Our vision includes:

- Setting the national standard for participants in sustained recovery
- · Striving to eliminate barriers to recovery and increase equitable access to care
- · Reaching more families year in and year out
- · Nationally recognized Peer-recovery model with accredited Recovery High School
- Established partnerships with every high school in San Antonio
- A key point of civic pride; the average family says, "we're really lucky to have Rise Recovery in our city."

This plan was led by our Board of Directors, shaped by the expertise and guidance of Mission Matters Group, and made possible with the gracious investment of the Kronkosky Foundation. Throughout a robust engagement and planning process, we heard from staff, participants, stakeholders, Board members, researchers, donors, community and





service partners. In building this blueprint for the future, we remained true to what we have heard and hope you see your voice reflected here. We are committed to receiving your ongoing input and feedback as we journey through this plan and its priorities together.

Throughout this plan, you will see how we empower our staff to be ambassadors of the future. We challenge ourselves to strengthen our partnerships, build collaborative relationships with nonprofit, academic and community partners, and expand our reach by leveraging a new campus, advances in evidence-based practices and technology.

On behalf of Rise Recovery, we would like to thank all those who shared their wisdom, thoughts and vision in the development of this strategic plan. We asked challenging questions, you answered, and we were inspired. Together, we are creating the Rise Recovery of tomorrow.

Evita Morin

Coulo Melin

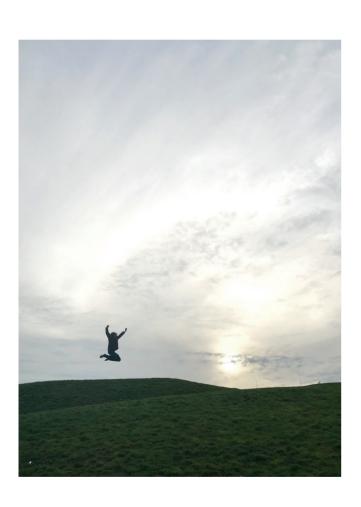
CEO - Rise Recovery

Organizational **Identity**



Misson

To help teens, young adults and families overcome the effects of drugs and alcohol and partner with the community in education and prevention.



Vision

We envision an always accessible community filled with strength, hope, and love in which all can reach our full potential, finding joy and purpose in our sustained recovery.

- Setting the national standard for participants in sustained recovery
- Striving to eliminate barriers to recovery and increase equitable access to care
- · Reaching more families year in and year out
- Nationally recognized Peer-recovery model with accredited Recovery High School
- Established partnerships with every high school in San Antonio
- A key point of civic pride; the average family says,
 "we're really lucky to have Rise Recovery in our city."

Company Core Values

Community: Open Hearts, Open Minds, Open Doors.

Giving back and building community through collaborations, cooperation, openness, and availability

Outstanding Service: Being the Hands and Feet.

Promoting healing by taking a personal inventory, modeling self-care, acting with integrity, and being accountable

Relationship: Extending God's Grace.

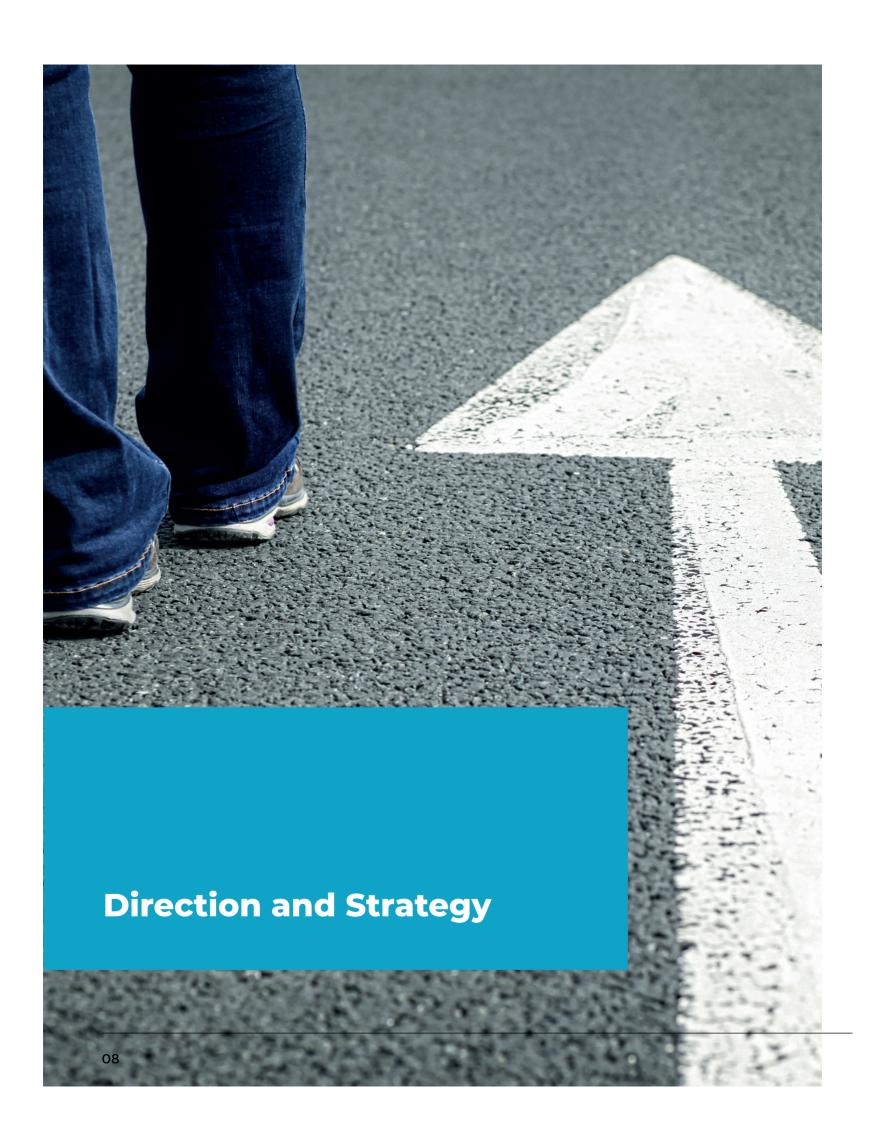
Creating and nurturing an environment that encourages deep personal connection, teamwork and growth

Empowerment: Unlocking Potential.

Fostering hope, healing, and a life full of purpose

Strategic Objectives FY21-24

- 1. Respond, recover, and retool to emerge stronger.
- 2. Be a national leader in peerbased recovery.
- **3. Expand our impact to reach more people.**
- 4. Continue a path toward financial sustainability.
- 5. Build a thriving organizational culture.



An organization has clear direction when it understands where it is going and how it will know when it has successfully arrived. At Rise Recovery our Strategic Objectives and Key Results point to our destination and define the criteria of a successful journey. By defining success with meaningful and measurable objectives, we enable the reverse engineering of strategy and equip our entire stakeholder community with a navigational tool to guide decision making along the way.

Our Strategic Objectives and Key Results outline the aspirational and yet realistic goals that we believe are critical to achieve in the next 4 years. Each objective is supported by a set of key results that will be used to measure whether or not we have achieved the objective. Only when each key result has been met will we consider our objective satisfied. We also understand that our environment will change, and the needs of our community will evolve. We plan for this by recognizing that we may need to modify our objectives and key results along the way. In the Organizational Operating System section of this plan we outline how we approach this with discipline, integrity, and purpose.

By defining success
with meaningful
and measurable
outcomes, we
enable the reverse
engineering
of strategy.

Effective strategy requires organizations to constantly evaluate and make sense of the complexities that exist within our internal and external environments while maintaining the ability to plan and execute our vision with intentionality and decisiveness. Finding a balance between analysis, action, and adaptability is critical in the pursuit of vision execution. In this section, we break down strategic planning into three parts:

The What: Overview of Strategic OKRs

The Why: Story behind Strategic OKRs

The How: Prioritization Map - Next 4 Years

By setting a clear direction and defining the strategy, we create the bridge between vision and execution.

The completion of an organizational discovery including the review of an environmental scan allowed us to zoom out to better understand the current state of Rise Recovery. This provided a more comprehensive view of recent performance and allowed us to more effectively set our 4-year Strategic Objectives. We then brought into focus what it would take to operationalize our vision through the development of our Strategic Objectives and Key Results. By setting a clear direction for the next 4 years, we defined our strategy and create the bridge between vision and execution.

The What:

Strategic Objectives and Key Results (FY21 - FY24)

Respond, recover, and retool to emerge stronger.

- Mossrock Campus on track to open by the 4th quarter of 2021.
- Successful launch of recovery high school by August 2021.
- Align on how to measure and report on core outputs and outcomes.
- Deliver bi-monthly outputs and outcomes reports to the Board.
- Serve 1500 direct participants this FY.

Be a national leader in peer-based recovery.

- 80% of participants are engaged in sustained recovery annually*.
- Present at 3 conferences reaching a national audience.
- Earn formal accreditation from Association of Recovery High Schools.
- Implement pilot consulting service to support other organizations implementing the peer-based recovery model.
- Support holistic recovery by adding new services for direct participants.**

Expand our impact to reach more people.

- Serve 2,000 unduplicated, direct-service participants annually by 2024*
- Serve 1,000 unique family members annually by 2024**
- Increase awareness in San Antonio from 8% to 50% by 2024.
- Participant Net Promoter Score of 30 or higher in 2024.***
- Establish partnerships with 10 school districts or charter networks.****
- Grow enrollment at the Recovery HS to 50 students by 2024.

^{*}Sustained at least 6 consecutive months of sobriety, asked at 12m marker

^{**}e.g. workforce readiness, recovery yoga, meditation, medical professional in service, smoking cessation, art and music therapy, financial literacy etc.

^{*}participants = enrolled in direct services; ~10% growth annually

^{**}family members = New Gens + Parents/Partners/Love Ones; ~15% growth annually

^{***30 - 70} very good/great

^{****}partnership as evidenced by a formal service agreement

Continue a path toward financial sustainability.

- 20% of revenue is Earned by 2024.*
- Build an Operating Reserve of 6 months Operating Expenses by 2024.
- Triple the number of individual donors by 2024 to 900 annually.
- Generate 10 planned gifts by 2024.

Build a thriving organizational culture.

- Increase the number of employees engaged from 40% to 60%*
- Meet/Exceed annual Board performance Scorecard results as reported quarterly in the Board Performance Scorecard**
- Staff compensation at or above market rate levels and distributing performance-based pay increases by 2022.
- High-performing leadership team as evidenced by meeting/exceeding annual goals***
- Disciplined execution and revisiting of the Strategic Plan by running on EOS - includes annual, quarterly and weekly planning rhythms through 2024.

^{*}Earned: revenue generated by RR services and/or a RR social enterprise

^{*}Gallup 12 Survey; 70% = "world class", 30% = "average"

^{**}Board Performance Scorecard includes the following metrics: 100% annual giving participation; 85% Board meeting attendance; 100% participation in at least one Committee; achievement of annual recruitment/retention objectives for member skill and diversity attributes that reflect the regions we deliver services in.

^{***}as directed by the strategic plan

The Why:

Storylines behind our Strategic Objectives and Key Results

Through the process of creating the 4-year Strategic Plan, it was clear to every stakeholder that 2020 has been a year of significant disruption and that effectively responding to the impacts of the pandemic would need to take priority. Before moving to the remaining strategic objectives, Rise Recovery is committed to building a strong foundation primed for growth, launching new programs and operating our own facility for the first time in our history. The focus of FY 21 is two-fold:

- Ensure two new major initiatives are on track to launch in FY 22- The new Mossrock Campus and the Recovery Highschool and
- 2. Demonstrate the measurable impact we are having in order to strengthen our support with existing stakeholders and to drive performance improvement and internal focus and alignment.

Throughout our entire history Rise Recovery has operated in borrowed space. The decision to raise over \$7 million to build our own campus has our organization in a position to have an even deeper impact. While it's an exciting time, it's also a time that brings increased complexity. In addition to continuing to operate our existing programs, Rise Recovery's leadership team and board will also be focused on ensuring that the Mossrock

Strategic Objective 1:
Respond, recover,
and retool to emerge
stronger.

Campus opens by the end of calendar year 2021. Until the new campus opens, the newly launched pilot Recovery High School will be operating at Anne Frank Charter School. A focus for the for remainder of the fiscal year will be to ensure that the pilot runs smoothly and is primed to expand as the Mossrock campus opens and becomes the new home for the Recovery High School.

Another area of focus in the remainder of FY 21 will be to establish clarity in how we demonstrate our measurable impact. The board and leadership team know that our peer recovery model is having significant impact, but at times it can be challenging to share the extent of that impact with an expanded stakeholder circle. In order to strengthen engagement with existing stakeholders and to develop new support, we are committed to identifying the outcomes that matter most and aligning and adjusting our programs and services to achieving them.

In summary, we will know we're successful if we've achieved the following key results:

- Mossrock Campus on track to open by the 4th quarter of 2021.
- · Successful launch of recovery high school by August 2021.
- Align on how to measure and report on core outputs and outcomes.
- Deliver bi-monthly outputs and outcomes reports to the Board.
- Serve 1500 direct participants this FY.

At RR, we have a deep conviction that the key ingredient to the success of our model is that peers are guiding our clients through their recovery. As this strategic plan was being developed, nearly every stakeholder interviewed gave rave reviews about the front-line peer recovery specialists. The incredible work our peers are doing is seen as one of the greatest strengths of the organization. In order to more clearly understand and demonstrate the impact we are having through our peer-based support programs, we are committed to empowering our clients with the tools and resources needed to maintain sobriety for at least 6 months. We are committed also to adding more services directly or through partnerships that will lead to higher sustained recovery rates.

We also recognize that our peer recovery programs are a bit of a secret. Few people outside of our existing stakeholder groups are familiar with our peer-based model. With expanded resources through the opening of the Mossrock campus and an improved ability to demonstrate our measurable impact, we are confident that we can become a national leader delivering peer-based recovery to teens and young adults. In order to ensure we are

Strategic Objective 2:

Be a national leader

in peer-based

recovery.

running the new recovery high school with excellence our goal is to earn a formal accreditation from the Association of Recovery High Schools. A strong indicator that we have become known as a national leader in peer-based recovery is will be when we begin training other peer providers. We see this happening in year 3-4 of this plan, once we have attained our own certifications and operated with them for at least one year.

We will promote the results of our programs through local and national publications and seeking opportunities to speak at national conferences. We believe that both key activities will work to

strengthen our stakeholder support, and likely go a long way in helping us to develop partnerships with new key funders. Additionally, as we become more well-known in our region it will support our efforts to attract world-class employees. In summary, we will know we're successful if we've achieved the following key results:

- 80% of participants are engaged in sustained recovery annually*.
- Present at 3 conferences reaching a national audience.
- · Earn formal accreditation from Association of Recovery High Schools
- Implement pilot consulting service to support other organizations implementing the peer-based recovery model.
- Support holistic recovery by adding new services for direct participants**

*Sustained at least 6 consecutive months of sobriety, asked at 12m marker

**i.e. workforce readiness, recovery yoga, meditation, medical professional in service

Along with our desire to deepen the impact we are having with the clients we are serving; we also are committed to serving more clients year over year. Because we have seen such dramatic transformation with the youth and family members we serve, we want to expand our capacity to serve more people. For many of our clients, our peer recovery model empowered them to experience sustained recovery for the first time, and we know that there are so many more youth that we could impact. We plan to expand our capacity to serve 100-200 more clients year over year until we are serving 2,000 unique family members by the end of FY2024.

Despite our long history in San Antonio, because of our size, we are still relatively unknown. We have identified a few primary methods to drive growth. The first is to increase awareness in San Antonio. Our desire is to work with a great PR group to share our stories of impact, highlight our growth as we move into our new campus and highlight our pioneering recovery high school. The

Strategic Objective 3: Expand our impact to reach more people.

second growth driver will be to build raving fans who refer new clients to us. Since we also work with the family members of our clients, we have a great opportunity to impact each family and develop more and more referrals based on our testimonies. The third way we plan to reach more clients is through our school partnerships. Our school partnerships are one of our most significant current referral sources. There are still several school districts and even more charter schools that would make great partners. As we seek to expand the number of clientswe serve, expanding our school partnerships will be one of our most significant paths to do so.

In summary, we will know we're successful if we've achieved the following key results:

- Serve 2,000 unduplicated, direct-service participants annually by 2024*
- Serve 1,000 unique family members annually by 2024**
- Increase awareness in San Antonio from 8% to 50% by 2024.
- Participant Net Promoter Score of 30 or higher in 2024.***
- Establish partnerships with 10 school districts or charter networks.****
- Grow enrollment at the Recovery HS to 50 students by 2024.

*participants = enrolled in direct services; ~10% growth annually

**family members = New Gens + Parents/Partners/Love Ones; ~15% growth annually

***30 - 70 very good/great

****partnership as evidenced by a formal service agreement

The uncertainly of 2020 has taught us how critical having a healthy financial reserve is. It has also taught us the importance of all our programs being well-funded and not running at a deficit. Ultimately, we can't achieve any of our strategic objectives or vision without being great financial stewards. Although we weathered the financial impacts of COVID and are in good financial standing now, we did have to eliminate a few key positions and additional expenses to get there. That only added extra work to our remaining team. Therefore, we have prioritized building a 6-month financial reserve by the end of FY 2024.

We are also prioritizing earned revenue a strategy to drive financial flexibility. We recognize that adding additional social entrepreneurial ventures that aren't directly tied to service delivery run the risk of diluting our focus on delivering our services with excellence. The focus will be on being paid for services we are already delivering such as the recovery high school. Our goal is to

Strategic Objective 4:
Continue a path
toward financial
sustainability.

double earned revenue from the current 10% to 20% by the end of FY 2024.

We are committed to diversifying our funding sources as well. One primary goal to drive financial flexibility is to double the number of individual donors. More unrestricted funds will increase our ability to give our staff annual raises as well as to flexibility to innovate. We will identify new types of unrestricted funding sources that are in alignment with achieving our strategic objectives. Lastly, to further secure our financial stability, we will be developing a planned giving initiative and have set a goal to secure 10 commitments by the end of FY 2024.

In summary, we will know we're successful if we've achieved the following key results:

- 20% of revenue is Earned by 2024.*
- Build an Operating Reserve of 6 months Operating Expenses by 2024.
- Triple the number of individual donors by 2024 to 900 annually.
- · Generate 10 planned gifts by 2024.

*Earned: revenue generated by RR services and/or a RR social enterprise

Our fifth and final objective is focused on the desire to drive organizational health. As we grow, we want to ensure that we are don't spread out staff too thin, and that we also set clear expectations for our board. We recognize that in order to attract the best talent in peer support and recovery communities, we need to offer above average pay and benefits. We also need to ensure that our staff are fulfilled and engaged in our roles. To help

Strategic Objective 5:

Build a thriving

organizational

culture.

us measure engagement, we are using the Gallup 12. Our goal is to achieve 60% engagement, which is the level of highly performing organizations. Our vision is to create a workplace in which our team members recommend to our peers that they should join our team at Rise Recovery. We want Rise to be one of the most sought-after employers in Texas in the recovery community.

Two other key areas of focus in building a thriving organizational culture are to develop a highperforming leadership team and a highly engaged and performing board. We will monitor the performance of the leadership team on our ability to achieve annual organizational goals and to set and achieve quarterly priorities that get the organization closer to achieving the strategic objectives outlined in this plan. To help drive board performance we will evaluate giving levels and meeting and committee participation. We also recognize that the board needs be more ethnically diverse, and an immediate focus will be in recruiting for increased diversity in order to bring different perspectives to the board.

In summary, we will know we're successful if we've achieved the following key results:

- Increase the number of employees engaged from 40% to 60%*
- Meet/Exceed annual Board performance Scorecard results as reported quarterly in the Board
 Performance Scorecard**
- Staff compensation at or above market rate levels and distributing performance-based pay increases by 2022.
- High-performing leadership team as evidenced by meeting/exceeding annual goals***
- Disciplined execution and revisiting of the Strategic Plan by running on EOS includes annual, quarterly and weekly planning rhythms through 2024.

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**Board Performance Scorecard includes the following metrics: 100% annual giving participation; 85% Board meeting attendance; 100% participation in at least one Committee; achievement of annual recruitment/retention objectives for member skill and diversity attributes that reflect the regions we deliver services in.

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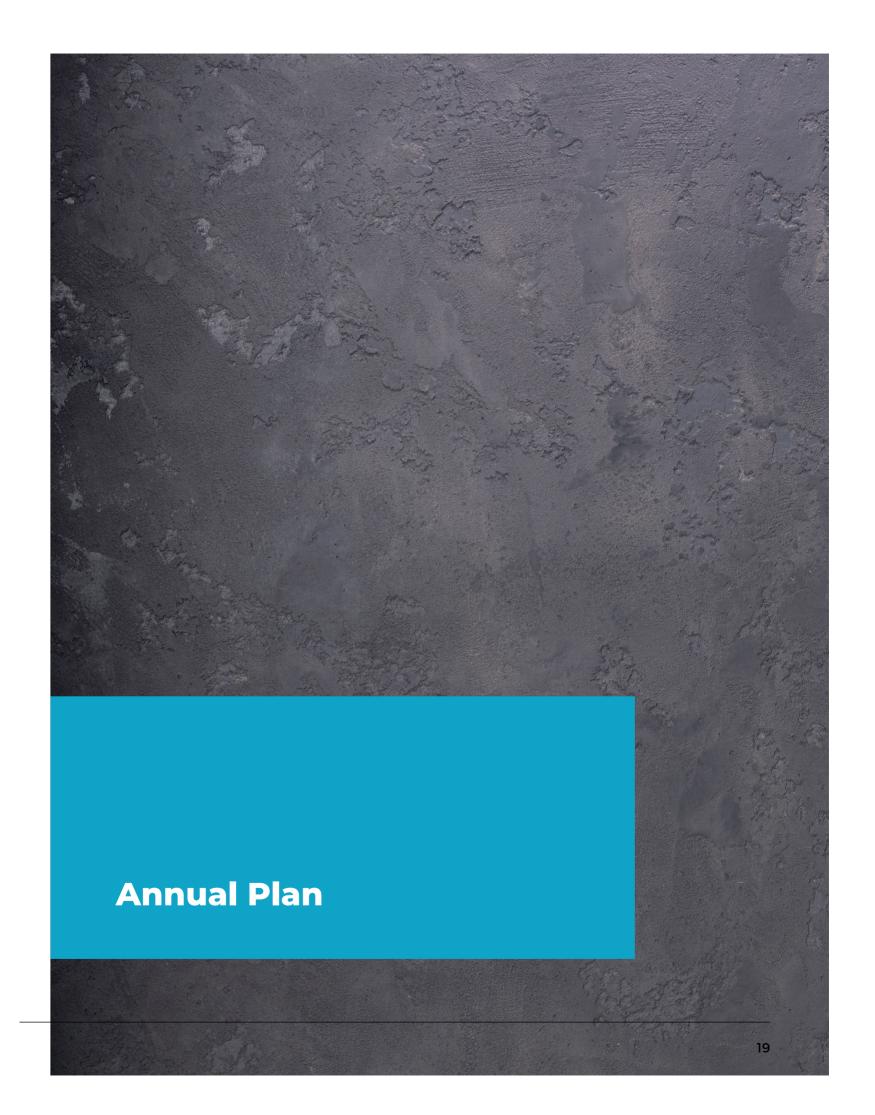
The How **Prioritization Map - Next 4 years**

Over the course of the next 4 years, we will prioritize our Strategic Objectives and Key Results in the following ways.

Strategic Objective	FY21	FY22	FY23	FY24
Respond, recover, and retool to emerge stronger.				
Be a national leader in peer-based recovery.				
Expand our impact to reach more people.				
Continue a path toward financial sustainability.				
Build a thriving organizational culture.				

Key

Primary Focus	Secondary Focus



To operationalize the vision and strategy of Rise Recovery, we have developed a set of Annual Goals to achieve in the next 8 months (Nov 2020 - June 2021). Each of the Annual Goals aligns with our 4-year Strategic Objectives and is accompanied by a set of Key Initiatives to prioritize this year in pursuit of achieving the goal.

In addition, we understand that a plan without a system for implementation is bound to fail. For this reason, we have scripted into this plan our intentional approach to execution by defining our Organizational Operating System.

Annual Goals	Alignment to Strategic Objective
 Mossrock Campus on track to open by the 4th quarter of 2021. Successful launch of recovery high school by August 2021. Align on how to measure and report on core outputs and outcomes. Deliver bi-monthly outputs and outcomes reports to the Board. Serve 1500 direct participants this FY. 	Respond, recover, and retool to emerge stronger.
Offer 3 virtual education, outreach, and training opportunities that target and reach audiences outside of the greater San Antonio area	Be a national leader in peer- based recovery.
 Establish holistic service offering plan that is driven by best practices, to be prepared to launch in new facilities. **e.g. workforce readiness, recovery yoga, meditation, medical professional in service, smoking cessation, art and music therapy, financial literacy etc. 	Expand our impact to reach more people.
 Successfully acquire seed funding to support transition from pilot to Recovery School Implementation. Establish planned giving process, evidenced by receiving evidence our first pledged gift 	Continue a path toward financial sustainability.
Increase Gallup score from 40 to 45.	Build a thriving organizational culture.

Organizational
Operating System

Vision



Strategic Objectives and Key Results



1-Year Annual Plan



90-Day Rocks

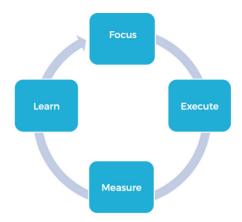
Realizing the Vision of Rise Recovery and achieving the Strategic Objectives and Key Results outlined in this plan will require a disciplined and systematic approach to execution. In this section, we outline the operating system on which Rise Recovery will implement the Strategic Plan. Our system, modeled after the Entrepreneurial Operating System (EOS), is a set of codified processes and rhythms that aim to bring clarity, alignment, and accountability to our organization. When implemented with fidelity, the Organizational OS creates the ongoing organization-wide focus required to achieve transformational outcomes within our community.

Living in a 90-Day World

Bringing the Vision and 4-year Strategic Objectives down to earth requires shifting our perspective to a 90-Day World. Coined by EOS, this idea stems from a natural phenomenon – that human beings lose focus every 90 days. The reality is that most leadership teams focus on too many priorities and as a result don't achieve those that are most essential. To address this challenge, we will implement a routine throughout the entire organization that creates a 90-Day World. This cycle of aligning every 90 days on what went well, what didn't go well, and what will be the focus for the next 90 days creates the focus, alignment, and learning necessary to continuously make progress toward our long-term goals and objectives. We'll call the measurable priorities set on a quarterly basis Rocks as they will represent the most important items to accomplish during the next 90 days.

The Cycle

Operating in a 90-Day World also means leveraging the power of habit and routine. By defining the keys to effective strategic plan implementation, we take the first step toward automating execution. The Cycle consists of 4 deliberate phases that are implemented in perpetuity over the life of the strategic plan.



- Focus: what is our priority right now? How will we know if we're successful?
- Execute: what is the plan? who is responsible for what? How will we monitor our progress?
- **Measure:** Did we achieve our goals? How do we know?
- Learn: What did we learn? How will we improve?

The Rhythms

The cycle described above runs on 3 unique rhythms: The Annual, The Quarterly, and The Weekly. Each rhythm is anchored by a recurring meeting in which the team monitors progress, reviews achievement, and sets the focus for the next cycle. In the table below, we have outlined the core components of each rhythm.

Monitor: Strategic Objectives and Key Results
 Review: Annual Goals
 Set: Next Year's Annual Goals

 Monitor: Annual Goals
 Review: Quarterly Rocks
 Set: Next Quarter's Rocks

 Monitor: Quarterly Rocks
 Set: Next Weekly Scorecard and To Do's
 Set: Next Week's Priorities and To Do's

Board Integration

The achievement of our 4-Year Strategic Objectives and Key Results will require the ongoing engagement and support of our Board of Trustees. To maximize the impact of our Board, we will ensure that our internal rhythms align and integrate with the routines of the Board. In the table below, we have outlined how our organizational rhythms align with the routine meetings of the board.

Annual Board Retreat

- Monitor: Strategic Objectives and Key Results
- · Review: Previous Year's Annual Goals
- · Approve: Next Year's Annual Goals (Organization)*
- · Set: Next Year's Board Goals**

Bi-Monthly Board Meetings

- · Monitor: Annual Goals and Quarterly Rocks
- · Review: Quarterly Rocks
- · Set: Next's Quarter's Board Rocks

*During the Annual Board Retreat, the Board of Trustees will approve the Annual Goals of the Rise Recovery CEO.

**This plan recommends the Board of Trustees set and adopt annual goals for the Board that align with and support the achievement of the organization's Annual Goals.

