NEW HANOVER COUNTY

BOARD OF ADJUSTMENT

230 GOVERNMENT CENTER DRIVE, LUCIE HARRELL CONFERENCE ROOM
WILMINGTON, NORTH CAROLINA 28403

MEMBERS OF THE BOARD
Cameron Moore, Chairman Mark Nabell, Vice-Chair
Hank Adams Kristin Freeman Raymond Bray

BOARD ALTERNATES
Pete DeVita Michael Keenan, Sr. Richard Kern

Wayne Clark, Director of Planning & Land Use Sharon Huffman, Deputy County Attorney

July 28, 2020, 5:30 PM

I. Call Meeting to Order (Chairman Cameron Moore)

II. Approval of June Minutes (*currently in draft status)*

June Member Attendees: Cameron Moore, Mark Nabell, Pete DeVita, Kristin Freeman, Michael Keenan

III. Old Business

Case ZBA-949 - Gregory Alan Heafner, PA, applicant, on behalf of Gary and Lisa Hooker, property owners, is requesting a reasonable accommodation under the Federal Fair Housing Act per Section 10.3.13 of the Unified Development Ordinance to allow up to 8 residents in a group home located at 6601 Newbury Way. *(This item was continued from the June 23, 2020 meeting.)*

IV. Regular Items of Business

VI. Other Business

VII. Adjourn

MINUTES
ZONING BOARD OF ADJUSTMENT
DRAFT

The New Hanover County Zoning Board of Adjustment held a regular and duly advertised meeting at 5:30 P.M. at the New Hanover County Government Center Complex, 230 Government Center Drive, in the Lucie Harrell Conference Room, Wilmington, NC, on Tuesday, June 23, 2020.

Members Present
Cameron Moore, Chairman
Mark Nabell, Vice-Chair
Michael Keenan
Kristin Freeman
Pete DeVita

Members Absent
Hank Adams
Ray Bray
Richard Kern

Ex Officio Members Present
Ken Vafier, Executive Secretary
Sharon Huffman, Deputy County Attorney
Sheighla Temple, Zoning Official
Denise Brown, Clerk

The meeting was called to order at 5:30P.M. by the Chairman, Mr. Cameron Moore.

Mr. Moore explained that the Zoning Board is a quasi-judicial board appointed by the Board of Commissioners to consider zoning ordinance variances from residents in New Hanover County where special conditions would create unnecessary hardships. He said the Zoning Board also hears appeals of the County's interpretation in enforcement of the Unified Development Ordinance. The appellants have thirty days in which to appeal any decision made by the Board to Superior Court.

APPROVAL OF FEBUARY 25, 2020 MEETING MINUTES

Following a motion by Mr. Keenan and seconded by Vice-Chair Nabell the minutes from the February 25, 2020 meeting minutes were unanimously approved.

Chairman Moore informed Board members that the applicant from the second case on today's agenda is present to request a continuance of the case hearing.

Ms. Jacklyn Feliciano, on behalf of the Oxford House, appeared requesting CASE ZBA-949 be continued to the Board's next scheduled meeting on July 28, 2020.

Ms. Feliciano stated the presiding attorney was unable to attend due to late notice of the meeting.

Mr. DeVita made a motion for ZBA-949 be heard at the next scheduled meeting on July 28, 2020. Mr. Keenan second the motion. All ayes.

Chairman Moore informed residents who were in attendance for the ZBA-949 meeting to contact staff and or the Oxford House representative after today's meeting for regulations related to the case.

CASE ZBA-928 (continued from February 25, 2020 meeting)

Chairman Moore explained witnesses sworn in at the February 25, 2020 meeting remain under oath and do not require to be sworn in for testimony.

Chairman Moore stated at the February 25, 2020 meeting, after conducting a quasi-judicial hearing on the request for a variance from the withholding of permits penalty for unauthorized removal of regulated trees, this item was ultimately continued by the Board in order for the applicant to propose mitigation for the unauthorized tree clearing.

The applicant has provided documentation to staff detailing actions that have been performed in order to provide mitigation.

Ms. Susan Moore Skinner, applicant and property owner, stated they were unaware of a permit was required for the tree harvest. Also, Ms. Skinner stated she was not sure if the logger had obtained a forestry management plan. Ms. Moore presented the following as mitigation actions for the unauthorized tree clearing:

1. The applicant requests to reduce the 3-year penalty to one year, to conclude on August 9, 2020.

2. The inclusion of approximately 8, 000 seedling pines were replanted onsite in February 2020.

3. The provision of a written Forestry plan for the property by a certified NC Forestry.

4. Examination of the drainage ditch on March 17, 2020 where it was observed that the ditch was draining properly.

STAFF OVERVIEW:

Mr. Vafier stated that currently the tree line remains intact as related to the previous clearing. Mr. Vafier stated the applicant has provided some mitigation measures due to the clearing as requested by the Board at the February meeting.

Mr. Vafier stated the vacant land is in the RA zoning district, and a new buyer would be responsible for buffers along Castle Hayne Road if the site is developed. Mr. Vafier stated if a forestry plan would have been previously provided to staff prior to conducting the timber harvest, the applicant would not need a variance.

Sharon Huffman - County Attorney

Ms. Huffman stated that today's hearing was an approved continuance requested by the applicant and approved by Board members at the February 25, 2020 meeting. The public hearing has not been opened, the applicant is to present mitigation measures to the Board in support of a variance approval. Ms. Huffman stated the Board must have language to draft an order if they decide to approve the variance.

There was no one present to speak in opposition to granting the variance request.

BOARD DISCUSSION

Chairman Moore stated the applicant obtained a contractor to perform the tree harvest and a permit was not obtained and there is no forestry plan on record with the county. Mr. Keenan stated that the applicant presents a hardship due to the lack of of a tree removal permit which could result in loss of sale of property.

Mr. Nabell stated that the applicant was not aware of the tree harvest ordinance. Mr. DeVita made a comment that there has been a tree harvest regulation for years. Mr. DeVita stated the applicant was not aware a tree permit was not required and it was not their fault. The applicant thought they were in regulation due to the land has been previously harvest. Mr. DeVita asked what responsibility did the applicant have prior to the tree harvest had they obtained a tree harvest permit. Mr. DeVita made a motion to approve based on the applicant's proposed mitigation.

Chairman Moore asked if Mr. DeVita would include the facts of findings in his motion as to assist staff in language in drafting an order of the approved variance.

Mr. DeVita made a motion to include conditions 1, 2, 4 and 5 of the proposed mitigation by the applicant as submitted. Vice-Chair Nabell second the motion.

The Board was unanimous in approving the applicant's variance request with approved mitigation actions.

PRELIMARY FINDINGS OF FACT:

1. **It is the Board's conclusion that, if the applicant complies with the literal terms of the ordinance, specifically the (3) year withholding of development approvals in Section 5.3.3 B of the New Hanover County Unified Development Ordinance, that an unnecessary hardship would result. This conclusion is based on the following FINDINGS OF FACT:**

    - There is potential loss of property value as a result of the 3- year withholding of development clause.

    - Proposed mitigation actions, including tree replanting and obtaining a forestry management plan, have already taken place.

2. **It is the Board's conclusion that the hardship of which the applicant complains results from unique circumstances related to the subject property, such as location, size, or topography. This conclusion is based on the following FINDINGS OF FACT:**

    - The property has existed as a tree farm since 1924 which was a contributing factor in overlooking current tree removal policies.

3. **It is the Board's conclusion that the hardship did not result from actions taken by the applicant or the property owner. This conclusion is based on the following FINDINGS OF FACT:**

    - The property owner hired a contractor who did not obtain a tree removal permit or exemption, leading to the applicant to not be directly at fault.

4. **It is the Board's conclusion that, if granted, the variance will be consistent with the spirit, purpose, and intent of the ordinance, such that public safety is secured, and substantial justice is achieved. This conclusion is based on the following FINDINGS OF FACT:**

- All proposed mitigation actions provide substantial justice as penalty and carry out the intent of the ordinance.

On a motion by Mr. DeVita. and seconded by Vice-Chair Nabell the Board voted 5-0 to grant the variance with specific conditions.

1) The 3-year withholding of permits is reduced to one year, to conclude on August 9, 2020;

2) The inclusion of approximately 8,000 seedling pines which were replanted onsite in February 2020;

3) The provision of a written forestry plan for the property by a certified N.C. Forester; and

4) Examination of the drainage ditch on March 17, 2020 where it was observed that the ditch was draining properly along Castle Hayne Road, appeared in satisfactory condition.

There being no further business before the Board, it was properly moved by Mr. DeVita and seconded by Mr. Keenan to adjourn the meeting. All ayes.

_____ _____

Executive Secretary Chairman

Date _____

REASONABLE ACCOMMODATION REQUEST
ZONING BOARD OF ADJUSTMENT
July 28, 2020

CASE: ZBA-949

PETITIONER: Gregory Alan Heafner, PA, applicant, on behalf of Gary and Lisa Hooker, property owners.

REQUEST: Reasonable accommodation request under the Federal Fair Housing Act per Section 10.3.13 of the Unified Development Ordinance to allow up to 8 disabled persons residing together in a group home.

LOCATION: 6601 Newbury Way
PID: R03515-006-006-000

ZONING: R-15, Residential District

BACKGROUND AND ORDINANCE CONSIDERATIONS:

The applicant intends to permit a group home run by the Oxford House at the subject property. The New Hanover County Unified Development Ordinance allows up to six disabled persons to reside in a group home by-right in the R-15 zoning district per the Principal Use Table in Section 4.2.1:

Table 4.2.1: Principal Use Table
Key: **P** = Permitted by Right **S** = Special Use Permit Required ***** = Specific Use Standards Apply in District *blank cell* = not allowed

Use	Zoning District																						Use Standards
	RA	AR	R-20S	R-20	R-15	R-10	R-7	R-5	RMF-L	RMF-M	RMF-MH	RMF-H	PD	UMXZ	B-1	CB	B-2	O&I	SC	CS	AC	I-1	I-2	
Group Living																								
Group Home	P *	P *	P *	P *	P *	P *	P *	P *	P *	P *	P *	P *	P *	P *		S *				S *				4.3.2.2

Additional standards for group homes are detailed in Section 4.3.2.B.3, as well as a process described under section 10.3.13 by which a group home provider may petition for a reasonable accommodation under the Federal Fair Housing Act to vary any of the provisions outlined in Section 4.3.2 B, including the number of residents, parking allowance, or distance requirement. Section 10.3.13 also details the eligibility requirements for residents of a Group Home.

> ***Group Home*** *– A home in which more than three unrelated persons with a disability, as defined in the U.S. Fair Housing Act, 42 U.S.C. 3601 et seq., live together as a self-supporting and self-sufficient household unit.*

The Fair Housing Act defines persons with a disability to mean those individuals with mental or physical impairments that substantially limit one or more major life activities. The term mental or physical impairment may include conditions such as blindness, hearing impairment, mobility impairment, HIV infection, mental retardation, alcoholism, drug addiction, chronic fatigue, learning disability, head injury, and mental illness.

4.3.2. RESIDENTIAL USES

B. Group Living

3. Group Home

Group homes shall comply with the following standards:

a. *Group homes shall be limited to six disabled persons living together as a self-supporting and self-sufficient household unit.*

b. *No group home shall be occupied or operated without zoning approval.*

1. *Group homes that are exempt from licensure pursuant to NCGS §122C-22 must recertify their exemption status annually; and*

2. *Group homes for special needs persons must recertify qualification of all residents as special needs persons annually.*

c. *Parking shall be provided in accordance with Section 5.1: Parking and Loading.*

d. *Group homes shall not be located closer than 2,000 feet to any other existing group home, measured by a straight line from the nearest property lines, irrespective of jurisdictional boundaries. The distance shall be reduced by the right-of-way of a major thoroughfare exceeding 100 feet, major topographical features such as a major watercourse, or by major nonresidential or public uses such as a park, school, or religious institution.*

e. *Reasonable accommodations shall be provided in accordance with Section 10.3.13, Reasonable Accommodation.*

The Zoning Board of Adjustment is authorized to grant requests for reasonable accommodation after a public hearing and finding that the request meets the criteria below, particularly if it is found to be both "reasonable" and "necessary:"

10.3.13. REASONABLE ACCOMMODATION

A. Applicability

1. General

This section provides a procedure for reasonable accommodation of eligible persons in cases where the strict application of the standards of this Ordinance would deprive them of their right to equal opportunity to use a dwelling under the federal Fair Housing Act.

2. Eligible Persons

a. *An eligible person is a person who meets the definition of a disabled or handicapped person under federal law.*

b. *A person recovering from substance abuse is considered a person with a disability or handicap provided they are not currently engaging in the illegal use of controlled substances.*

*(section **B** discusses the Reasonable Accommodation application and review procedures**)***

C. Reasonable Accommodation Review Standards

1. *A reasonable accommodation application shall be approved on a finding the proposed accommodation:*

- ***a.*** *Will be used by an individual or individuals with a disability or handicap protected under federal law;*
- ***b.*** *Is the minimum needed to provide accommodation; and*
- ***c.*** *Is reasonable and necessary.*

2. *For the purposes of this section, an accommodation is reasonable if it would not undermine the legitimate purposes of this Ordinance, it does not constitute a substantial alteration of this Ordinance or other County standard, and it will not impose significant financial and administrative burdens upon the County.*

3. *For the purposes of this section, an accommodation is necessary if it would provide direct or meaningful therapeutic amelioration of the effects of the particular disability or handicap, and would afford handicapped or disabled persons equal opportunity to use housing in residential districts in the County.*

The specific request is to allow up to 8 disabled persons instead of up to 6 disabled persons to reside in a proposed group home at 6601 Newbury Way. According to New Hanover County tax records, the home lies on a 0.35-acre parcel and contains 3,112 square feet of living area. A copy of the property record card is included as an addendum to this staff report.

Included with the petitioner's application is a statement of justification for the special exception request, as well as the Oxford House Manual.

BOARD OF ADJUSTMENT POWER AND DUTY:

The Board of Adjustment is authorized to grant reasonable accommodations for the special circumstances as set forth in 10.3.13 of the New Hanover County Unified Development Ordinance to allow for reasonable accommodation under the Federal Fair Housing Act. The Board of Adjustment shall grant a request for reasonable accommodation under the Federal Fair Housing Act if the Board finds by the greater weight of the evidence that the proposed special exception will be used by an individual or individuals with a disability or handicap protected under federal law, is the minimum needed to provide accommodation, and is both "reasonable" and "necessary."

1. "Reasonable" - An accommodation will be determined to be reasonable if it would not undermine the legitimate purposes of this Ordinance, it does not constitute a substantial alteration of this Ordinance or other County standard, and it will not impose significant financial and administrative burdens upon the County; and
2. "Necessary" - An accommodation will be determined to be necessary if it would provide direct or meaningful therapeutic amelioration of the effects of the particular disability or handicap, and would afford handicapped or disabled persons equal opportunity to use housing in residential districts in the County.

ACTION NEEDED (Choose one):

1. **Motion to approve the special exception request based on the findings of fact (with or without recommended conditions)**
2. **Motion to table the item in order to receive additional information or documentation (Specify).**
3. **Motion to deny the special exception request based on specific negative findings in either of the two categories above.**

NEW HANOVER COUNTY
BOARD OF ADJUSTMENT
230 GOVERNMENT CENTER DRIVE, LUCIE HARRELL CONFERENCE ROOM
WILMINGTON, NORTH CAROLINA 28403

ORDER TO GRANT/DENY A REASONABLE ACCOMMODATION REQUEST – Case ZBA-949

The Zoning Board of Adjustment for New Hanover County, having held a public hearing on July 28, 2020 to consider application number ZBA-949, submitted by Gregory Alan Heafner, PA, applicant, on behalf of Gary and Lisa Hooker, property owners, a request for reasonable accommodation under the Federal Fair Housing Act to allow up to eight disabled persons to reside together in a group home located at 6601 Newbury Way, and having heard all the evidence and arguments presented at the hearing, makes the following FINDINGS OF FACT and draws the following CONCLUSIONS:

1. **It is the Board's conclusion that the request to deviate to eight from the limit of six disabled persons living together in a group home at 6601 Newbury Way <u>is / is not</u> reasonable.** *Note: an accommodation will be determined to be reasonable accommodation if it would not undermine the legitimate purposes of this Ordinance, it does not constitute a substantial alteration of this Ordinance or other County standard, and it will not impose significant financial and administrative burdens upon the County.* **This conclusion is based on the following FINDINGS OF FACT:**

    - _____.
    - _____.
    - _____.
    - _____.

2. **It is the Board's conclusion that the request to deviate to eight from the limit of six disabled persons living together in a group home at 6601 Newbury Way <u>is / is not</u> necessary.** *Note: an accommodation will be determined to be necessary if it would provide direct or meaningful therapeutic amelioration of the effects of the particular disability or handicap, and would afford handicapped or disabled persons equal opportunity to use housing in residential districts in the County.* **This conclusion is based on the following FINDINGS OF FACT:**

    - _____.
    - _____.

- _____.
- _____.

THEREFORE, on the basis of all the foregoing, IT IS ORDERED that the application for a REASONABLE ACCOMMODATION under the Federal Fair Housing Act per Section 10.3.13 of the New Hanover County Unified Development Ordinance to allow up to 8 disabled persons to reside together in a group home located at 6601 Newbury Way be GRANTED/DENIED.

ORDERED this 28th day of July, 2020.

_____

Cameron Moore, Chairman

Attest:

_____

Kenneth Vafier, Executive Secretary to the Board

Case: ZBA-949

Address: 6601 Newbury Way
Reasonable Accommodation Request
Applicant: Greg Heafner
Owners: Gary & Lisa Hooker

Vicinity Map

New Hanover County Zoning Board of Adjustment **March 24, 2020**

Case: ZBA-949

Address: 6601 Newbury Way
Reasonable Accommodation Request
Applicant: Greg Heafner
Owners: Gary & Lisa Hooker

Zoning Map

New Hanover County Zoning Board of Adjustment

March 24, 2020

Case: ZBA-949

Aerial Map

Address: 6601 Newbury Way
Reasonable Accommodation Request
Applicant: Greg Heafner
Owners: Gary & Lisa Hooker

New Hanover County Zoning Board of Adjustment

March 24, 2020

NEW HANOVER COUNTY
PLANNING & INSPECTIONS

Application for
SPECIAL EXCEPTION

230 Government Center Drive
Suite 110
Wilmington, NC 28403
910-798-7165 phone
910-798-7053 fax
www.nhcgov.com

Petitioner Information	Property Owner(s) *If different than Appellant*	Subject Property
Name: Greg Heafner	Owner Name: Gary Hooker	Address: 6601 Newbury Way
Company: Gregory Alan Heafner, PA	Owner Name 2: Lisa Hooker	Parcel ID:
Address: 1510 Twisted Oak Drive	Address: 5717 Mossdale Lane	Area:
City, State, Zip: Chapel Hill, NC 27516	City, State, Zip: Charlotte, NC 28278	Summary of Special Exception Requested: Allow 6 persons to live at 6601 Newbury Way
Phone: 919.967.3800	Phone: 919.524.2704	
Email: gsheafner@bellsouth.net	Email: gary.hooker@bellsouth.net lisa.hooker@bellsouth.net	
Application Tracking Information (Staff Only)		
Case Number: ZBA-949	Date/Time received: 3/3/20 4:50 pm	Received by: KV

APPLICATION OVERVIEW

In order to assist petitioners through the process for requesting a special exception, petitioners are highly encouraged to attend a pre-application conference prior to application submittal. Petitioners are requested to review the Section 63.11 of the Zoning Ordinance prior to submission, and advised to contact Planning Staff with any questions.

Requests for special exceptions to any of the provisions of Section 63.11 of the Zoning Ordinance may be taken to the Board of Adjustment. The Board of Adjustment will hear and decide on the special exception in a quasi-judicial proceeding. The Board of Adjustment shall grant a special exception to any provision of this ordinance as a reasonable accommodation under the Federal Fair Housing Act if the Board finds by the greater weight of the evidence that the proposed special exception is:

1. "Reasonable." An accommodation will be determined to be reasonable if it would not undermine the legitimate purposes and effects of existing zoning regulations, and if it will not impose significant financial and administrative burdens upon the County and/or constitute a substantial of fundamental alteration of the County's ordinance provisions; and
2. "Necessary." An accommodation will be determined to be necessary if it would provide direct or meaningful therapeutic amelioration of the effects of the particular disability or handicap, and would afford handicapped or disabled persons equal opportunity to enjoy and use housing in residential districts in the County.

A concurring vote of four-fifths (4/5) of members of the Board is necessary to grant a special exception.

Unless otherwise published or announced, Zoning Board of Adjustment meetings are held on the 4th Tuesday of each month at 5:30PM in the Lucie F. Harrell Conference Room at 230 Government Center Drive. All meeting dates and application deadlines are published on the New Hanover County Planning website.

NEW HANOVER COUNTY
PLANNING & INSPECTIONS

230 Government Center Drive
Suite 110
Wilmington, NC 28403
910-798-7165 phone
910-798-7053 fax
www.nhcgov.com

AUTHORITY FOR APPOINTMENT OF AGENT

Please note that for quasi-judicial proceedings, either the land owner or an attorney must be present for the case at the public hearing.

The undersigned owner does hereby appoint an authorized the agent described herein as their exclusive agent for the purpose of petitioning New Hanover County for a variance, special use permit, rezoning request, and/or an appeal of Staff decisions applicable to the property described in the attached petition. The Agent is hereby authorized to, on behalf of the property owner:

1. Submit a proper petition and the required supplemental information and materials
2. Appeal at public meetings to give representation and commitments on behalf of the property owner
3. Act on the property owner's behalf without limitations with regard to any and all things directly or indirectly connected with or arising out of any petition applicable to the New Hanover County Zoning Ordinance.

Agent Information	Property Owner(s)	Subject Property
Name: Greg Heafner	Owner Name: Gary Hooker	Address: 6601 Newbury Way
Company: Gregory Alan Heafner, PA	Owner Name 2: Lisa Hooker	City, State, Zip: Wilmington, NC 28411
Address: 1510 Twisted Oak Drive	Address: 5717 Mossdale Lane	Parcel ID:
City, State, Zip: Chapel Hill, NC 27516	City, State, Zip: Charlotte, NC 28278	
Phone: 919.967.3800	Phone: 919.524.2706	
Email: gsheafner@bellsouth.net	Email: gary.hooker@bellsouth.net lisa.hooker@bellsouth.net	
Application Tracking Information	(Staff Only)	
Case Number Reference: ZBA-949	Date/Time received: 3/3/20 4:50 pm	Received by: KV

This document was willfully executed on the 2nd day of March, 2020.

Owner 1 Signature

Owner 2 Signature

PRE-APPLICATION CONFERENCE ENCOURAGED

In order to assist petitioners through the process for filing a request for special exceptions, petitioners are highly encouraged to attend a pre-application conference prior to application submittal. Applications for special exceptions must be filed no later than 5:00PM on the application deadline day prior to a Zoning Board of Adjustment meeting.

REQUEST FOR SPECIAL EXCEPTION

In the space below, please describe the request for the special exception, including what provision(s) of Section 63.11 from which the special exception is being requested. Applicants are advised to demonstrate how the special exception request is reasonable and necessary as described on Page 1. Please attach additional sheets if necessary.

SEE ATTACHED STATEMENT OF JUSTIFICATION

By my signature below, I certify that this application is complete and that all of the information presented in this application is accurate to the best of my knowledge, information, and belief.

Signature of Applicant and/or Property Owner **Date** 3/2/2020

STATEMENT OF JUSTIFICATION

Oxford House, Inc. requests a Special Exception from Section 63.11:1 of the County Zoning Ordinance, which section limits the number of disabled persons that may live in a group home to six.

Specifically, Oxford House requests that eight disabled women be allowed to live at the Oxford House located at 6601 Newbury Way in Wilmington. It will be what Oxford House calls, a house for women with children. Specifically, up to eight women, two of which may have a child, will live at the home. The maximum age for a male child is ten and the maximum age for a female child is twelve, however usually the children are babies. The house itself is a single-family detached home, 3350 square foot home, with 6 bedrooms, 4 baths, and a two-car garage with additional driveway parking.

New Hanover County's zoning ordinance defines Oxford Houses as a "group homes" pursuant to the definition of same in the ordinance. Further, the residents of Oxford House are defined as "disabled persons" pursuant to the definition of same in the ordinance.

WHAT IS AN OXFORD HOUSE

Oxford Houses are homes for persons recovering from alcoholism and or drug addiction, who are no longer using alcohol or drugs. Oxford House is a self-run, self-supported recovery home concept and standardized system of operation that served as the model for the self-run, self-supported group recovery homes authorized for start-up loans under §2036 of the Federal Anti-Drug Abuse Act of 1988, PL 100-690. This legislation required each state to set aside $100,000 in a revolving loan fund to make loans to recovering addicts and alcoholics to assist in the

establishment of housing that is financially self-supported, democratically run, and immediately expels anyone who relapses.

Many of almost three thousand Oxford Houses in the United States were started with loans pursuant to this Act through contracts with state governments. Most of the nearly three hundred Oxford Houses in North Carolina were started with loans pursuant to this Act through an ongoing contract with the State of North Carolina. Since 1990, the State of North Carolina, through the Department of Health and Human Services, has entered into annual contracts with Oxford House, Inc., the umbrella organization of the national network of Oxford Houses, to help establish and assist in the maintenance of a statewide network of Oxford Houses.

Each Oxford House is chartered by Oxford House, Inc., a 501(c)(3) nonprofit umbrella organization. Three basic conditions are required to obtain a charter: 1). The house must be democratically self-run following the standard system of operation set forth in the Oxford House Manual; 2). The house must be financially self-supporting by the individual residents paying equal shares of household expenses in a timely manner, and; 3). The house must immediately expel any resident who returns to using alcohol or drugs inside or outside of the house.

Oxford House, Inc.'s by-laws preclude it or its chartered houses from owning residential property, thus all Oxford Houses are rented. A group wanting to start an Oxford House behaves in the household rental market just like an ordinary family. It finds an available, suitable house and rents it by paying the first month's rent and security deposit to a willing landlord. Usually, these funds come from the above referenced start-up loans. Oxford House residents are encouraged to rent single family dwellings in good neighborhoods.

The houses operate autonomously, but must follow the procedures in the Oxford House Manual and adhere to the conditions of its charter. Each Oxford House has its own bank account.

There are no dues or fees to Oxford House, Inc. by individual houses, but having a charter gives the houses technical assistance and support by Oxford House, Inc., including defense of the civil rights of every Oxford House.

Oxford Houses are not substance abuse centers or halfway houses. No treatment, counseling, therapy, or any kind of health care is provided. There is no house manager, paid staff, or other type of institutional personnel involved in the supervision or management of the house. All decisions relating to the functioning of the house are made democratically. Each house manages its own finances. There is no required random testing for alcohol or drug use, nor are there any required rules relating to curfews. In an Oxford House, residents live there by choice.

Oxford House residents are considered to be the functional equivalent of a family for several reasons. First, all the residents have access to the entire house. Second, all the residents participate equally in the housekeeping functions of the house, such as chores and finances. Each resident, however, is responsible for his own food and cooking. Third, the quality of the relationship among the residents is one of emotional and mutual support and bonding giving each resident support in their recovery from alcoholism and providing an ameliorative therapeutic benefit toward recovery to each resident. Fourth, the living arrangement is not based upon a profit motive. Finally, there are no limits as to how long a resident can stay in Oxford House. The average length of stay, nationally, is about thirteen months. For more detailed information about Oxford House and its recovery program and the benefits thereof, see the Oxford House Manual enclosed herewith and incorporated herein by reference, and the Oxford House website at www.oxfordhouse.org.

The residents of Oxford House are considered "disabled persons" pursuant to the definition of same in the County's ordinance. Oxford House residents are a protected class under the Federal

Fair Housing Act, and the American with Disabilities Act. See the Fair Housing Act (FHA), 42 U.S.C. 3600 et. seq. Recovering addicts and alcoholics are specifically included within the definition of "handicapped" or "disabled" individuals under these Acts. See 42 U.S.C. 3602(h), and *City of Edmonds, WA v. Oxford House, Inc.* 514 U.S. 725 (1995); *Oxford House v. City of St. Louis*, 77 F.3d 249 (8th Cir. 1996); *United States (on behalf of Oxford House) v. Village of Palatine*, 37 F.3d 1230 (7th Cir. 1994); *United States (on behalf of Oxford House) v. Village of Audubon*, 797 F. Supp. 353, aff'd without opinion, 968 F.2d 14 (3d Cir. 1992); *Oxford House, Inc. v. Town of Babylon,* 819 F. Supp. 1179 (E.D.N.Y. 1993); *Oxford House v. Township of Cherry Hill*, 799 F. Supp. 450 (D.N.J. 1992); *Oxford House-Evergreen v. City of Plainfield*, 769 F. Supp. 1197 (D.N.J. 1991), and; *Tsombanidis, and Oxford House, Inc. v. City of West Haven, Connecticut,* 180 F. Supp. 262 (Ct. 2001).

As members of a protected class under the FHA, Oxford Houses are protected against discriminatory zoning practices. As such, the issue of whether an Oxford House is in violation of local zoning ordinances is not relevant to the question of federal law. See *United States (on behalf of Oxford House) v. Village of Audubon*, supra. The FHA prohibits discriminatory land use decisions by local governments, even when such decisions are "ostensibly authorized by local ordinance." See *Oxford House Evergreen v. City of Plainfield*, supra; also 42 U.S.C. Section 3615 ("any law of a State, a political subdivision, or other jurisdiction that purports to require or permit any action that would be a discriminatory housing practice under this subchapter shall to that extent be invalid under the Fair Housing Act").

The aforementioned prohibition under the FHA against zoning discrimination by local governments includes the requirement that local governments make reasonable accommodations in their zoning ordinances to allow the operation of Oxford Houses. Specifically, 42 U.S.C.

3604(f)(3)(B), defines discrimination to include a "refusal to make reasonable accommodations in rules, policies, practices, or services, when such accommodations may be necessary to afford such handicapped person equal opportunity to use and enjoy a dwelling." See *Oxford House v. City of St. Louis,* supra; *Oxford House v. City of Plainfield*, supra; *Oxford House v. Township of Cherry Hill,* supra, and; *Oxford House, Inc. v. Town of Babylon*, supra. The County's zoning ordinance is ostensibly a means for the County, through its BOA, to provide the required reasonable accommodation.

The Section 63 of the County Zoning Ordinance follows federal law by requiring a reasonable accommodation when the request is both reasonable and necessary as each is defined in the law and set forth in Section 63.1 of the ordinance. Specifically, the ordinance defines reasonable and necessary as follows:

1. "Reasonable". An accommodation will be determined reasonable if it would not undermine the legitimate purposes and effects of the existing zoning regulations, and if it would not impose significant financial and administrative burdens upon the County and/or constitute a substantial or fundamental alteration of the County's ordinance provisions; and
2. "Necessary". An accommodation will be determined necessary if it would provide direct or meaningful therapeutic amelioration of the effects of the particular disability or handicap, and would afford handicapped or disabled persons equal opportunity to enjoy and use housing in residential districts of the County.

Under Section 63.1 of the ordinance, upon the finding that the request by Oxford House is reasonable and necessary as defined above, the BOA shall grant the requested exception to allow

8 persons to live at 6601 Newbury Way. The reasonableness and necessity as to Oxford House at 6601 Newbury Way are set forth below.

REQUEST IS REASONABLE

No Burden

There is no evidence of any financial or administrative burden on the County by the existence of the Oxford House. In fact, the Oxford House will provides a free benefit to the County by providing housing and aiding in the recovery of those recovering from alcoholism and drug addiction.

Zoning Scheme Not Undermined or Fundamentally Altered

The Oxford House does not undermine the purposes of the County's zoning ordinance. The ordinance expressly allows for this type of housing. The ordinance also allows for this type of housing at this particular location. Further, the ordinance was recently amended to provide for an exception or reasonable accommodation for the request made herein. The ordinance itself is proof that the Oxford House does not undermine the County's ordinance or fundamentally alter its zoning scheme. There are other Oxford Houses in the County in similar zoning districts, and none have undermined or fundamentally altered the County's zoning scheme.

REQUEST IS NECESSARY

Therapeutically Beneficial

By its very nature the Oxford House model's therapeutic benefit is derived solely from its residents. As described above, in an Oxford House there are no counselors, managers, care providers or outside personnel that provide any therapeutic services. Oxford Houses are not like traditional group homes, halfway houses, or family care homes - all of which have managers and provide some services to their residents. In such traditional homes a lesser number of residents

will not have any therapeutic impact. Not so in an Oxford House. The quality of the relationship among the residents in an Oxford House is one of mutual support and bonding, providing an ameliorative therapeutic benefit which aids each resident in their recovery from alcoholism or drug addiction. As a result of this therapeutic benefit, those living in an Oxford House are more likely to remain clean and sober than those living on their own.[1]

The average number of residents in an Oxford House in North Carolina is eight (8). The average vacancy rate for Oxford Houses in North Carolina is one (1), meaning that with an allowed maximum capacity of 8, the Oxford House at 6601 Newbury Way will usually have just 7 residents. If the house is not granted the requested exception, then it would be limited to 6 residents. With the average vacancy rate, a 6 person Oxford House would usually have only 5 residents. As set forth above the oxford House model requires a minimum of 6 residents at all time to hold all required offices (president, vice president, secretary, treasurer, comptroller, and coordinator). A house that falls below six residents on a regular basis can lose it charter from Oxford House, Inc. Without the requested accommodation/exception, the Oxford House 6601 Newbury Way would be put in jeopardy of failing for lack of enough residents. Failure of the house means it would close, causing its residents to lose their home and support in their recovery. Invariably some would relapse. Relapse could be permanent and fatal. The ameliorative

[1] DePaul University study that followed 897 residents in 219 Oxford Houses across the country for 27 months found that only 13% relapsed. A peer-reviewed published report of that study in Addictive Behaviors 32 (2007) can be downloaded at the Oxford House, Inc. website under "Publications/Evaluations/DePaul." In another study 150 individuals getting out of primary treatment were divided into two groups of 75 each with one group going to Oxford Houses and the other group going to normal living situations, each group was followed for two years after treatment and the Oxford House group did substantially better in staying clean and sober – 66% v. 33%. American Journal of Public Health, Oct 2006; Vol. 96, pp1727–1729.

therapeutic benefit of the requested exception here is a threshold, make or break degree of amelioration.

An Equal Opportunity to Use and Enjoy Housing of Their Choice

Finally, the Oxford House at 6601 Newbury Way will be home to its residents. The requested accommodation/exception provides the residents an equal opportunity to use and enjoy housing of their choice[2].

Without the requested accommodation the house would close as noted above. Closing of the house cause some residents to relapse, with potentially fatal consequences as noted above. Additionally, finding another house to rent to potentially relocate the Oxford House would be extremely difficult. Finding landlords willing to rent to Oxford House is difficult because of the stigma of alcoholism and drug addiction, the fear of zoning problems, neighbor ignorance and opposition, and finally because Oxford House requires long-term leases into which many landlords simply will not often enter.

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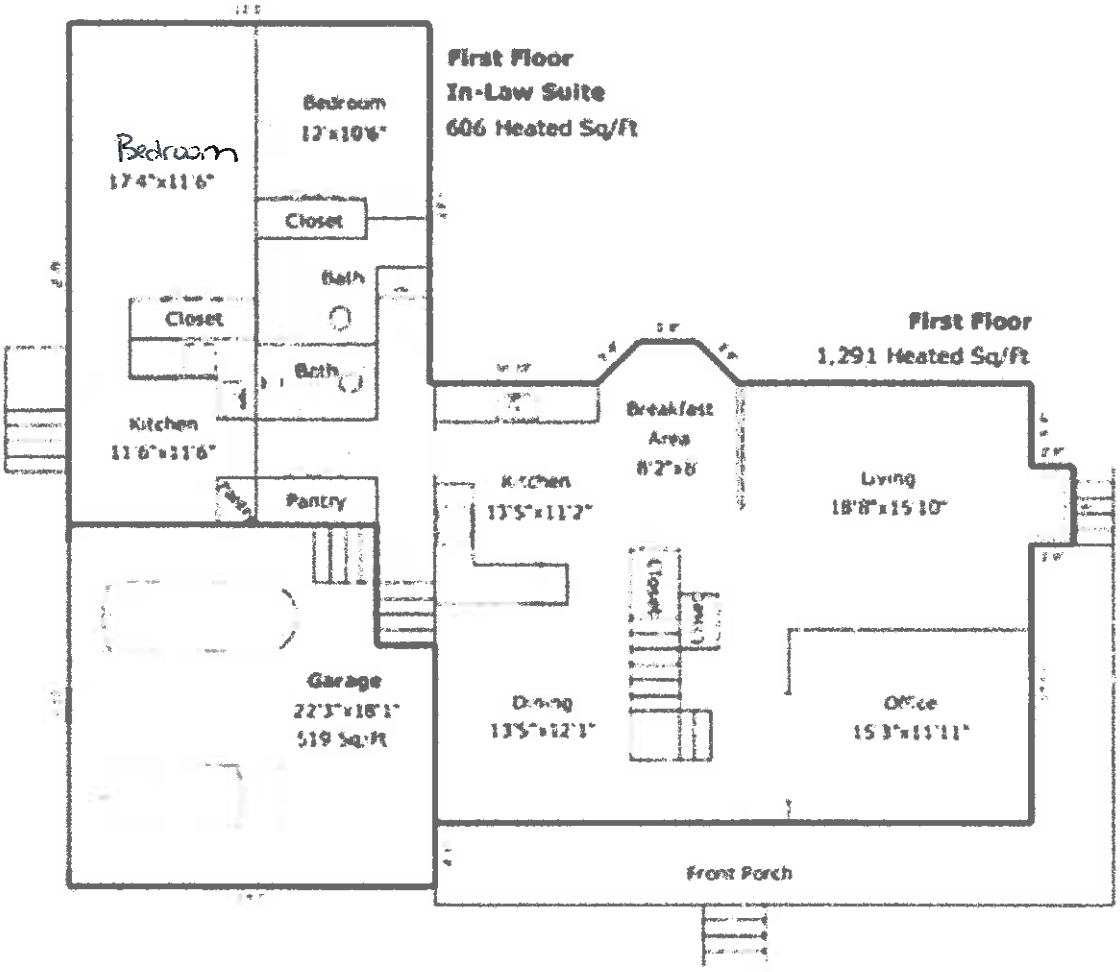
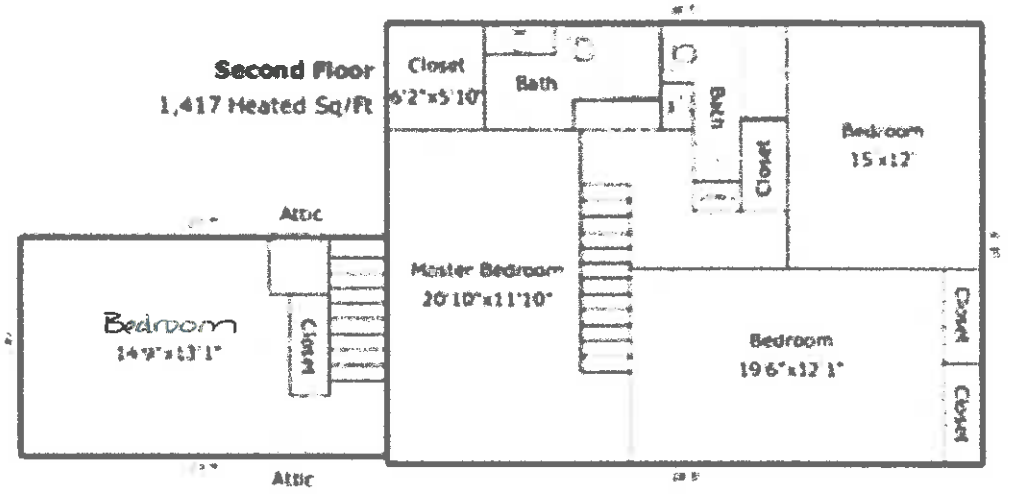
[2] The County's ordinance falls short of what federal law requires as to equal opportunity. The law requires not just an equal opportunity to enjoy and use housing "in residential districts in the County", but requires equal opportunity for disabled person to enjoy and using housing *of their choice*. Several courts have held the FHA protects the rights of disabled persons to use and enjoy the particular dwelling of their choice. *See, e.g., Hovson's, Inc. v. Township of Brick*, 89 F.3d 1096, 1103-06 (3rd Cir. 1996); *United States v. City of Jackson*, 318 F.Supp.2d 395, 416 (S.D. Miss. 2002) (FHA "guarantee[s] that the disabled be afforded equal opportunity to live, not in some residence in the community, but rather in the residence of their choice"); *ARC of New Jersey, Inc. v. State of New Jersey*, 950 F. Supp. 637, 645 (D. N.J. 1996) ("Such ceiling quotas [imposed via group home spacing rules] improperly limit the ability of handicapped persons 'to live in the residence of their choice in the community,' House Report at 24, even if imposed in the name of integration or 'declustering'"); *Oxford House, Inc. v. Town of Babylon*, 819 F. Supp. 1179, 1185 n.10 (E.D. N.Y. 1993) (FHA "dictates that a handicapped individual must be allowed to enjoy a particular dwelling, not just some dwelling somewhere in the town"); *Oxford House-Evergreen v. City of Plainfield*, 769 F. Supp. 1329, 1344 (D. N.J. 1991) (defense based on existence of alternative locations in the city for group home held "without merit").

6601 Newbury Way

3,315 Heated Sq/Ft





CERTIFICATION OF COMPLIANCE WITH NEW HANOVER COUNTY CODE FOR GROUP HOMES

I (we) the undersigned operator of a group home at 1601 Newbury Way, Wilmington, New Hanover County, NC, certify that the residents residing at this address meet the definition of disabled persons as defined in the New Hanover County Zoning Ordinance Section 23, or that the facility is exempt from licensure pursuant to North Carolina General Statutes §122C-22. If the facility is exempt from licensure, applicant shall cite exemption status below. The undersigned agrees to notify the zoning office of any changes to this application, including procedures for ensuring compliance with county's Zoning Ordinance.

Special Needs Individuals: 6

Exempt pursuant to GS §122C-22: yes

Certified this 2 day of March, 2020.

Applicant: Jaclyn Feliciano on behalf of Oxford House Newbury

By: Jaclyn Feliciano

Title: Outreach Coordinator

Sworn to and subscribed before me this 2nd day of March, 2020.

JONATHAN ACOSTA NOTARY PUBLIC NEW HANOVER COUNTY, NC My Commission Expires 04-16-2024

Notary Public

My Commission Expires: 04-16-2024

Oxford House Manual©

An Idea Based On a Sound System
For Recovering Alcoholics and Drug Addicts to Help Themselves

HOUSING,

FELLOWSHIP,

SELF-RELIANCE,

SELF-RESPECT,

FOR RECOVERING INDIVIDUALS

Commemorative Edition

16th Oxford House World Convention

Portland Marriott Downtown Waterfront
Portland, Oregon

September 11 to 14, 2014

Oxford House, Inc., the umbrella organization of the worldwide network of individual Oxford Houses, is the non-profit corporation that provides charters to eligible groups of recovering alcoholics and drug addicts who want to establish a new Oxford House™.

Introduction

This is the sixth edition of the Oxford House™ Manual©, which has served thousands of Oxford House members since 1975. There are Oxford Houses for men. There are Oxford Houses for women, and for women and children. There are no co-ed Oxford Houses.

On November 18, 1988 President Ronald Reagan signed P.L. 100-690, the Anti-Drug Abuse Act of 1988, which established a nationwide program to encourage the mass replication of recovery houses based upon the Oxford House™ concept. At the request of Congress, Oxford House™ worked with them in crafting a simple, but workable, start-up loan program in each state. Originally the start-up loan program was mandatory but now it is permissive.[1] Some states have start-up revolving loan funds and some do not.

Expansion of Oxford Houses began in June 1989. Within five years the number of Oxford Houses had grown from 18 primarily located in and around the Nation's Capitol to more than 500 located in 39 states.[2] Each individual Oxford House™ receives a charter from Oxford House, Inc., the umbrella organization of the national network of individual Oxford Houses. Oxford House™ has become a national self-help movement that provides a missing link in the recovery process from alcoholism and drug addiction.

This edition or up-date is dedicated to Jim S., the first member voted into Oxford House™ – as were the second to fifth editions. On August 19, 1987, Jim died – at far too young an age but with over 12 years of remarkable sobriety. He touched hundreds of recovering alcoholics with his dedicated program of joyful sobriety and taught everyone that sobriety could be happiness, a good time, and a full and totally rewarding life. For two and a half years he lived in Oxford House™, keeping everyone's spirits up and proving that Oxford House™ worked, and then rejoined his wife and two children.

As a "graduate of Oxford House™" Jim kept coming back to bring "newcomers" in and help "old-timers" out. Jim taught us all that you don't need to drink to have a good time in an Oxford House™. It is a very special fraternity.

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[1] See the Oxford House website: www.oxfordhouse.org under "About Us/History" for the text of the current law.

[2] The number of Oxford Houses reached 1,767 early in the third quarter of 2014 just prior to the 16th Oxford World Convention held at the Portland Marriott Downtown Waterfront Hotel in Portland, Oregon. The total number of Oxford Houses includes houses in 45 US states and Australia, Canada, England and Ghana.

The Oxford House™ Story

In October 1975, the first Oxford House™ was opened in Silver Spring, Maryland, by a group of recovering alcoholics and drug addicts, who had been living in a county government-run halfway house. Each of them had been clean and sober for but a short period of time when they learned that the halfway house was to be closed. Each of them was fearful that he would return to alcoholic drinking or drug use without the support of living in a group committed to staying sober and clean.

When the news reached them that the halfway house was going to be closed, their first reaction was one of anger, resentment and panic. They had known that the halfway house had a "six month rule" which required an individual to move out after six months to make room for a newcomer. As a matter of fact, during their tenure in the halfway house, they had watched 12 men move out at the end of six months. Eleven of the 12 had returned to drinking or using drugs within a month. That fact only added to the fears and insecurity they felt upon learning that the house they lived in would be closed and they all would have to move within thirty days.

A private individual, a member of Alcoholics Anonymous, held the lease on the house the county was closing. Several of the men faced with eviction approached him to see if there was some way the county could be convinced to change its decision. He felt such a change of heart was impossible. It was a matter of economics. County halfway houses cost a lot of money to run. The county budget was tight and Alpha I, as the halfway house was named, would definitely be closed. He then asked if the men had given any thought to taking over the house themselves.

Over the next several days, hope began to replace the despair shared by the men but a number of obstacles stood between the ideas of taking over the house themselves and the reality of being able to do it. Where would they get the money? All of them had drunk themselves out of good jobs and few of them had done more than day work since getting sober. How could they pay for the rent, the utilities, the food and a counselor to manage a halfway house? Who could they find to run the house, even if they could come up with the money? Day and night they discussed the possibilities among themselves and went to a lot of AA meetings in order to get the advice of AA members. Time and again AA members gave them encouragement. "Just don't drink," they heard over and over again. "Keep it simple" and "Remember–a day at a time," were offered as advice almost as frequently.

Slowly an idea began to form that maybe it could be done. The first task involved studying the costs of the halfway house to determine how much money was needed. The largest single cost was the paid manager, cook and counselor attached to the house. Someone suggested maybe they could live without a paid manager or cook or counselor. But who would be the supervisor or manager if they did not have a paid manager who lived in the house? Of all the men to live in the new house, only one had gained six months of sobriety.

The men decided that the cost of a manager, cook and counselor was too great. If there were going to be any chance of maintaining the house, a way would have to be found to learn how to stay sober and manage a house without a paid staff.

One man recalled that he had lived in a college fraternity with sixteen men that did not have a paid manager. Of course there had been no requirement of not drinking in that house. As the men talked about the fraternity house concept, fear of being able to enforce sobriety without

the presence of a paid authority figure became the heart of the matter. They had been without real responsibility for so long there was considerable doubt about whether or not they could act responsibly as a group.

As discussions centered on whether or not they could run a house themselves, talk would inevitably drift into complaints about the halfway house way of life. There were a lot of rules. Lights out at eleven o'clock at night. Everybody up at six in the morning. Breakfast at exactly seven o'clock. Table setting, dishwashing, vacuuming, trash removal, bed making – all specific assignments to be done at a specific time and in a particular way. Any suggested changes to the rigid routine were dismissed with a lecture and a warning to shape up or ship out. As much as the residents of the halfway house resented the arbitrary rules, the fear of having no place to live was even greater.

After days and days of discussions an organizational plan began to evolve which gave the group the confidence they needed to give it a try. Their experiences in the halfway house – both positive and negative – helped them develop an organization to carry the responsibilities for which the manager, cook and counselor had been responsible for in the county halfway house. And so, the Oxford House concept began to take form.

On the positive side of the ledger of halfway house experience was the re-enforcement of sobriety that was gained by knowing that immediate eviction followed taking the first drink. From the start, the founders recognized that there had to be an absolute rule against any alcohol or drug use by members of the house. The problem for a self-run group house was how to develop procedures to make sure that any resident who drank or took drugs would be thrown out. It was finally decided that the only way it could be done would be to call a meeting of the house members and discuss the situation. If a member had taken drugs or a drink, there would have to be a vote to expel him from the house. If a majority of the members agreed that the member had in fact taken a drink or drugs, he would automatically be out.[2]

Before the first relapse occurred there was considerable debate among the members about how one could tell if an individual has in fact returned to drinking or taking drugs. Some members thought that the house should purchase a breathalyzer to test everybody to guard against the "secret drinker" among us. Others suggested the election of an official "sniffer" (as a less expensive safeguard). New houses today will probably go through the same kinds of concern. The fact of the matter is that no member of a house is able to fool other members for very long. We are all professional alcoholics and/or drug addicts who would have done anything to drink and take drugs. We really do know all the tricks of the trade and a relapse cannot be covered up by any one of us for very long.

Unfortunately, relapses can occur. Some members of an Oxford House™ will return to their addiction. When they do, it is important for the other members of the house to act promptly. The worse mistake any house can make is to let a slip or relapse by one member slide. That slip endangers the sobriety of every other member of a house and can quickly ruin the house for everyone. Every Oxford House™ resident knows before moving in that the use of

[2] The first Oxford House™ tried a system that distinguished drinking or taking drugs *in the house* from drinking or taking drugs *outside the house*. In the former case expulsion from the house was automatic; in the latter case expulsion was likely but if the membership felt it was warranted a member who had relapsed away from the house could be given probation. This was done in four cases and it did not work in any of them. In each case the member with the relapse had relapsed again within a period of a few days or weeks. Experience showed that probation did not work. Therefore any slip or relapse now results in automatic expulsion. The vote taken by the house membership is solely to judge if in fact a relapse has taken place. The third condition of a house's charter absolutely requires immediate expulsion and no house wants to lose its charter.

alcohol or drugs will result in getting kicked out. Oxford House™ members have the responsibility to use "tough love" and promptly expel the slipper – for his welfare, their own welfare and the welfare of the entire house[3]

Once a member has been expelled from a house because he has returned to drinking or taking drugs, he cannot be readmitted unless there is a clear demonstration that he has returned to solid sobriety. Each house develops certain rules of thumb for determining a return to solid sobriety. Some accept successful completion of a 28-day rehabilitation program as a return to solid sobriety. Most generally require strong evidence of no drinking or taking of drugs and regular attendance at AA and/or NA as a minimum requirement for reacceptance into an Oxford House™[4].

The founders of Oxford House™ developed a democratic way of operation. They had to – they could not afford to pay a house manager or supervisor to take responsibility for them. The early history of Oxford House™ showed that the Oxford House residents could run a house on their own. Today, Oxford House™ is still self-run and it still works.

Within six months of its beginning, the first Oxford House™ had helped finance and start the second Oxford House™. Soon those two houses started a third and the three houses then started a fourth. Over its first thirteen years Oxford House™ grew from one house to more than twenty houses and the expansion of a good idea had just begun.

In October 1987, an Oxford House™ for men was started in Bethlehem, Pennsylvania – far away from the cluster of houses in the Washington, D.C. area. It worked and the eleven men in that Oxford House™ followed the pattern begun the Washington area thirteen years earlier by finding another house to rent to start a second house in the Bethlehem area.

Early in 1988, all the members of the individual Oxford Houses decided to establish a full-time central services office to provide other individuals recovering from alcoholism and drug addiction the technical assistance necessary for them to start Oxford Houses in their communities. There was a strong belief that Oxford House could work anywhere. As Oxford Houses open around the country, the first Oxford House in a particular area will follow the tradition set by the original Oxford House of helping other houses get started. Between 1989 and 2014, the growth of Oxford Houses has been phenomenal – more than 1,650 individual Oxford Houses have been started in 45 states, Australia, Canada, England and Ghana.

Foundations, businesses, churches, individual and government agencies have helped fund technical assistance to help get the first few Oxford Houses established in an area. However, expansion of the movement continues to rely primarily upon the volunteer efforts of individuals living in existing Oxford Houses working with newly-formed groups. Throughout the country

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[3] It is seldom easy to take action against the relapsing member but every Oxford House™ does. The first case is always the most difficult because all members in a house become friends and no one likes to have to throw a friend out. Nevertheless, principles must come before personalities and the member who has relapsed must leave the house right away. Otherwise the sobriety of every member of the house is threatened. More importantly, the good reputation of Oxford House™ is threatened. The first Oxford House™ used to be the subject of bets by outsiders about how soon it would fail. There was a genuine belief by many that a group house of recovering alcoholics and addicts could not work without a manager or counselor to enforce the edict against drinking or taking drugs. Those doubters all lost their bets because the members of Oxford House™ proved that they could act responsibly. The first responsibility of any Oxford House™ is to enforce sobriety.

[4] Once several Oxford Houses have opened a geographic area, each house keeps in touch with the other houses so that a relapsing member does not simply move from one house to another. On the other hand, once a relapsing member regains sobriety, it may be advisable for him to "start over" in another house in the area if it has room. The group conscience of those for whom Oxford House™ is working generally has no trouble in guiding the recovered relapser into the house that can give the most support

clusters of Oxford Houses have organized themselves into mutually supportive chapters working together to expand the number of houses so that every recovering alcoholic and drug addict can gain the support of living in an Oxford House™.

Each Oxford House™ has its own history but all Oxford Houses share a common history of operating in a democratic fashion on a self-supporting basis. That common history is the key to why Oxford House™ works. The *System of Operations* and the *Oxford House Traditions* contain the blueprint for any Oxford House™ to work well by following a tried and true path for success.

The *System of Operations* and *Oxford House Traditions*, which follow, are taken directly from the original Oxford House Manual© with very minor changes, duly noted through footnotes.

The key Oxford House™ organization is listed below. Direct any correspondence, telephone calls or e-mail to it. Its purpose is to be of help.

Oxford House World Services Office
1010 Wayne Avenue, Suite 300
Silver Spring, Maryland 20910

Telephone: 1-(301) 587-2916
Facsimile: 1-(301) 589-0302
Internet: www.oxfordhouse.org
E-Mail: Info@oxfordhouse.org

(Oxford House, Inc. is incorporated in Delaware and is a 501(c)(3) non-profit corporation.)

The following standard forms and others — time-tested to be helpful in running an Oxford House™ — are printed at the end of this manual and can be download from the website www.oxfordhouse.org

Membership Application

The standard form used by Oxford Houses to help evaluate the eligibility of applicants applying for membership in an Oxford House™.

Weekly Meeting Report

A form to record the minutes of the weekly meeting of the Oxford House™ family members so that the House has an on-going record of the democratic decisions made by the group.

Weekly Financial Report

A form to report who have paid their share of expenses, a list of expenses paid during the previous week, the amount of funds available to the house and a list of regular or unexpected expenses coming due with the next few weeks.

Oxford System Checklist

A checklist used by some Oxford Houses to remind members of the Oxford House™ family about the basic steps that have to be taken to make the house run on a financially sound basis.

Oxford House™ System of Operations

There is a frequent saying among Oxford House™ members that "Oxford House™ has no rules except 'Don't drink.'" For the most part, that saying is true. However, it does overstate the facts.

While rules at Oxford House™ are kept at a minimum, there are nevertheless rules. Unfortunately, it is impossible for any organization to function without having some system or procedures. The basic rule for all Oxford Houses is that they *must operate on a democratic basis.* Each member of the House has one vote. A majority rules except in the case of accepting a new recovering alcoholic or drug addict for membership when 80% of the current membership must vote its approval.

The following discussion spells out the Oxford House System of Operations. It draws upon the experience of the existing Oxford Houses and tells any recovering alcoholic or drug addict who is interested: (1) how to start an Oxford House™; (2) how to make an Oxford House™ run smoothly; and (3) how to manage money in an Oxford House™.

Oxford House, Inc., is the umbrella organization for all Oxford Houses. Any group of recovering alcoholics that wants to form an Oxford House™ must obtain a charter from Oxford House, Inc. The charter confers on the particular Oxford House™ the benefits of being part of a non-profit corporation that offers the experience and guidance necessary for making an Oxford House™ work.

Any group of recovering alcoholics and/or drug addicts can apply for an Oxford House™ charter. Oxford House, Inc., has no hard and fast rules as to the length of sobriety required of applicants who want to charter a new house. As a general rule, however, several members of any charter group should have several months of solid sobriety.

Obtaining a Charter

Two or more recovering alcoholics can apply for a charter from Oxford House, Inc., by completing an application for a charter[5] or simply writing a letter containing the pertinent information to Oxford House World Services. Pertinent information would include answers to the following questions:

1. Names of proposed charter members.
2. Length of sobriety for each proposed charter member.
3. The plans that the charter group has for renting or leasing a house.
4. The number of beds contemplated for use in the proposed new Oxford House™.[6]
5. The anticipated charge per person per week that would be needed to make the House self-supporting.

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[5] One can get a form to apply for a charter by writing to Oxford House, Inc., 1010 Wayne Avenue, Suite 300, Silver Spring, Maryland 20910 or by downloading a charter application form from the web site www.oxfordhouse.org by clicking "applications" under "Houses".

[6] To receive a charter the proposed house must be for a minimum of six residents. The largest Oxford House™ group to date has been eighteen. The best size group seems to be made up of eight to twelve members. Charters are only granted for single-sex houses. There are no "co-ed" Oxford Houses. Leases with landlords should make clear that no smoking within the house is permitted and that the use of decorative candles, incense or other items that represent fire hazards should be prohibited. Group safety is important.

Once Oxford House World Services has reviewed the application or letter from the prospective charter members, they will either issue a charter or suggest additional steps for the prospective members to take in order to obtain a charter. A charter will be issued if, in the judgment of Oxford House World Services, the proposed new Oxford House™ would have a reasonable chance of success.[7] All charters are issued conditionally. This means that the new group once started must demonstrate that it has learned the Oxford House system of operation sufficiently to be awarded a permanent charter.

In rare cases, Oxford House World Services will issue a charter prior to the actual acquisition of housing by the applicants. In such cases, the charter will be issued upon the condition that the charter members obtain a suitable house within a specific period of time.[8]

Obtaining a House

The Oxford House™ philosophy is one that relies on expanding capacity rather than limiting the length of time that a member can live in a House. To achieve sufficient capacity for providing enough rooms for all recovering alcoholics and drug addicts who want to live in an Oxford House™, it has been the custom for an established Oxford House™ to look for an additional house once it has become full and has applications that it is unable to accept because of lack of space.

The size, location and cost of a suitable house depends more on what is available than any specific criteria. The charter members who are looking for a suitable house should make certain that any prospective house can be occupied without violating local zoning or health and safety laws. In practice any Oxford House™ is no different from an ordinary family – except no one in an Oxford House™ drinks or takes mood- changing drugs.

As a matter of fact, most jurisdictions in the country do not have specific ordinances that relate directly to an Oxford House™-type situation. Most group housing ordinances, if they exist at all, are geared to highly institutionalized situations. Most commercial zoning ordinances, i.e., rooming houses, apartments, or hotels or motels, are inappropriate for the Oxford House™ situation. Under the Federal Fair Housing Act local governments are required to make a reasonable accommodation for recovering alcoholics and drug addicts to live in the supportive Oxford House™ living environment.[9]

If the charter members have any doubt as to how their particular jurisdiction will view an Oxford House™, they should face the matter directly and clear their occupancy with the local zoning authorities. Oxford House, Inc., is willing to provide any assistance it can for the

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[7] The Board of Directors has delegated the decision-making authority to approve charter applications to Oxford House World Services.

[8] This situation is more likely to occur when Oxford House™ is new to a geographic area. In those geographic areas where there is already an Oxford House™, those wanting to start a new House are more likely to find the available house first and then apply for a Charter. Following the tradition of early Oxford Houses each house tries to match supply of Oxford House™ recovery beds with the number of applicants wanting to live in an Oxford House™. Houses in an area always work through the chapter to make sure supply and demand stay in balance.

[9] The United States Supreme Court on May 15, 1995 issued a decision in *City of Edmonds, WA v. Oxford House, Inc.* (514 U.S. 725) which confirms that recovering alcoholics and drug addicts living in an Oxford House™ are "handicapped" and therefore a protected class within the meaning of the Federal Fair Housing Act, as amended, and local jurisdictions must make a reasonable accommodation to afford them living arrangements supportive of recovery. A number of subsequent federal cases have affirmed that Oxford Houses are not commercial institutions and should be treated as single families for purposes of zoning.

purpose of persuading local authorities to treat Oxford House™ the same as it would treat any other single-family residential property within its jurisdiction.[10]

Common sense should be used in selecting any house, to be used as an Oxford House™. It should have adequate plumbing, adequate kitchen facilities, adequate laundry facilities, a sufficient number of bedrooms, and a pleasant common living space. In addition, the area should be carefully examined to determine if parking of automobiles might cause a problem.

The amount of rent that a new group can afford depends on the number of beds that the house can hold. More than one bed should be put in larger rooms. New members moving into a house can be made to feel at home more easily if they share a room. Most Houses use a system of seniority for bed selection. "Old-timers" generally move into single rooms as new members move into the house. The single rooms are usually the smaller rooms in a house.

There are three reasons Oxford House™ encourages more than one to a room. First, newcomers maintain recovery better with a roommate. Loneliness continues to be a threat to sobriety and loneliness can be a problem for the newcomer adjusting to a new place to live. Second, the number of people living in a House directly affects the economics of an Oxford House™. The more people who live in a House the less each member has to pay for the House to be self-supporting. Third, roommates discourage having non-house members spending the night at an Oxford House™.

The size of the house has a direct relationship to the amount of rent a new group can afford to pay. In most areas the monthly rent will be the largest single cost for the members of a House to meet. For example, the very first Oxford House™ (Oxford House-Silver Spring)[11], held 13 members. The monthly rent was $700; utilities ran about $300 a month; staples about $250 a month.[12] The charge per member had been set at $30 a week. Since the House quickly became full and stayed full, income exceeded expenses.[13] As a matter of fact, after six months of operation the House had nearly $2,000 in the bank. It used $1,200 of that money to start a new Oxford House™ so that some of the recovering alcoholics who had applied to live in an Oxford House™ could live in one. Even today, most Oxford Houses have a backlog of applications. The tradition of some house members of an existing house helping to start a new Oxford House™ in an area continues.

As a general rule, it is easy to acquire furniture for a new House at little or no expense. Letting friends, family, and church groups know you are looking for furnishings can be very effective. Every community tends to be willing to help. Sometimes, however, it may be difficult to get beds and chests of drawers donated. Since beds are essential, members in a new house might want to buy twin-size mattress and box springs sets. New twin-size mattresses and box springs

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[10] In Bethlehem, Pennsylvania for example, Oxford House™ received a ruling from the Chief of the Bureau of Inspections that it is within the definition of "Family" as defined in the City Zoning Code. As a practical matter most jurisdictions so appreciate the useful service provided by an Oxford House™ that it is considered to have a "family" classification.

[11] Oxford House-Silver Spring was opened October 25, 1975 and continued to be an Oxford House™ until the end of 1984. It was located at
1219 Fiddler Lane, Silver Spring, Maryland. The building was razed to make way for another building in 1986.

[12] The first Oxford House™ and most subsequent Houses have bought milk, potatoes, spices, flour, coffee, bread, eggs and bacon on a group basis. Individual members get their own meals – either individually or as groups – but use the "staples" as needed. Note also that the figures used above are 1975 dollars or about one-half comparable 1987 dollars or one-third 2000 dollars.

[13] By late spring a surplus of nearly $2,000 was in the House treasury. The members met to decide whether to lower their weekly payment or to use the surplus to open a new House. They chose to open a new House in Washington, DC in May 1976.

cost between $90 to $120 per unit. Thrift stores, Goodwill or Salvation Army stores often have chests of drawers at a reasonable price. The first and most effective way to get furniture, however, is to ask for it from AA members. Often they are up-grading their own furnishing and are pleased to give their old furniture to an Oxford House™.

Other start-up costs include a month's rent in advance and a security deposit equal to one month's rent. New Houses often get a loan from AA members or other Oxford Houses in order to meet this expense. Whenever a loan is obtained, the members of the new House should agree to pay it back according to a definite schedule – at least $100 a month until it is repaid.[14] The good name of Oxford House™ is at stake whenever any House has a loan outstanding. Therefore, it is important to make payments on the loan on a regular basis.

Membership

The charter members of a new Oxford House™ constitute a basic core of membership for the House. Once the House has started, the charter members will want to bring in enough new members to fill all available beds. The higher the occupancy rate, the lower the rent that must be paid by each Oxford House™ member.

One of the requirements of an Oxford House™ charter is that new members must be approved by 80% of the existing members in a particular House. An approval by 80% of the existing members is required because it is extremely important for all of the members living in an Oxford House™ to feel comfortable with any newcomer. As a practical matter, existing Oxford Houses have denied membership to very few individuals. Most members of Oxford House™ keep their memory green and few applicants are excluded from membership. Those who are excluded are generally excluded because there are no beds available[15]. A waiting list is maintained, but it is of little value after a period of time because, when a person needs a room, he or she needs it immediately. On the other hand, the waiting list can be a useful resource for getting new members to help form another House.[16] The waiting list also is a ready resource for filling vacancies as members move out to live elsewhere in the community or are evicted because of a relapse to drinking or taking drugs.

Oxford House™ works well for men and for women. However, it has been the experience of Oxford House™ that it does not work well with men and women in the same House.[17] Relationships are bound to develop and will unnecessarily complicate the comfortable operation of an Oxford House™.

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[14] This is also true of loans received from a state revolving loan fund. Repayments on time is a must because it allows other groups to start houses and helps expand the opportunities for recovering individuals to stay clean and sober without relapse. State loans are usually $4,000 and are repaid at $170 a month for 24 months.

[15] Not everyone is suited for living in an Oxford House but the existing members should never exclude anyone simply because of race, creed or a disability co-occurring with addiction to alcohol or other addictive drugs unless such disability would make it difficult for an individual to function in an Oxford House. For example, being HIV positive does not – in and of itself – preclude successful Oxford House membership because, absent unprotected sex or needle sharing, HIV or AIDS is not contagious and hundreds of recovering individuals afflicted by HIV or AIDS are and have been successful Oxford House residents. Also, hundreds of recovering individuals with co-occurring mental illnesses or physical disabilities have been – and are – successful Oxford House residents. In considering whether an applicant will make a suitable Oxford House resident, the group conscience should always err on the side of providing a recovering individual a chance to benefit from Oxford House living. In other words, if the group believes the individual has exhibited a sincere desire to develop sobriety comfortable enough to avoid relapse, pay an equal share of household expenses and help others in recovery, the applicant should be accepted if space is available.

[16] Once an Oxford House™ has been established for a few months, there will soon be more applicants than there are beds available. The situation soon causes the members living in the House to start looking for an additional house to rent.

[17] In 1978, Oxford House™ opened a House intended for women but started with a core group of four men from an existing Oxford House™. After eight women moved into the House, the four men moved out with the expectation that their spaces would be filled by the women

When a new Oxford House™ is established, the charter members of the House should make themselves known to quarterway houses, halfway houses, detoxification units, drug courts, rehabilitation facilities, AA groups and NA groups within the area. Included among those items which should be stressed are that the House is democratically run; it is self- supporting; drinking or the taking of drugs is not permitted; and that both the new and not-so-new recovering alcoholics are welcome to come and live at the House as long as they do not drink or take drugs and pay their equal share of household expenses. Oxford House™ is not in competition with any of these groups. It is a resource for them to use in the common goal of helping the alcoholic avoid relapses. Many of these groups will become supporters of Oxford House™ and will refer new members to the House. Remember to explain that a new member must file an application, be interviewed and approved by 80% of the members living in Oxford House™.

Once an Oxford House™ has been established for a few months, applications for membership will exceed the space available. At that point in time, consideration should be given to opening a new Oxford House™ using some of the current members as a core group for the new House.[18] Generally, a few members in a House will begin thinking about opening another House in response to a House's inability to accept all the deserving applicants. They will discuss the matter at a House meeting and everyone will begin to look for a suitable additional house to rent. When such a house is found several existing members will volunteer to become the core group for a new House. The existing House begins to figure out ways to come up with the necessary money for starting the new House and checks with applicants to see if they would be willing to live in the new House. This is the way that Oxford House™ is able to comfortably exist with the principle of letting members live in an Oxford House™ for as long as they want provided they do not drink or use drugs and pay their rent.

Rules

Alcoholics and drug addicts by nature seem to dislike rules. There is only one rule applicable to all Oxford Houses; i.e. membership is conditioned on not drinking. It is impossible for a house of recovering alcoholics to stay sober if even one person is permitted to drink or take drugs. The presence of a practicing alcoholic among those who are trying to stay sober invites other relapses. As a matter of self-preservation it is necessary for the membership of an Oxford House™ to confront the relapsing member immediately. A meeting of the House should be held and if a majority of the members believe that a member is drinking or taking drugs that member should be asked to leave.

The rule relating to the use of alcohol or drugs grows out of common sense. That rule is the only rule considered mandatory once a group of recovering alcoholics has received an Oxford House™ charter. Other rules will tend to evolve from the membership of the House itself. Those rules should come into being only if they are absolutely necessary. The fewer the rules, the more likely it will be that a house will be successful. Different Houses will often tend to

accepting four additional women. Instead the women accepted four additional men as replacements and the House began to have problems. A number of relationships evolved between the men and women and soon a number of the members had returned to drinking. Oxford House, Inc. closed the House and reopened it as a House for men. It was clear then and continues to be clear today that men and women living in the same house operating under the self-support system of Oxford House™ create unnecessary additional stress to group living. Women's Oxford Houses work well; men's Oxford Houses work well; however, Houses with both men and women do not work and will not be granted a charter by Oxford House, Inc.

[18] In the first Oxford House™– Oxford House - Silver Spring– members felt confident enough after six months to start another House. They started the first house in Washington, DC by having four of the thirteen members in the original house move to form a core membership for the new House.

have different rules. For example, one Oxford House™ has a rule that requires unanimous consent before any pet can be brought onto the premises. Another Oxford House™ has two cats and a dog and would probably require unanimous consent before either the cat or the dog could be evicted.

In many alcohol rehabilitation units, there are rules covering a multitude of activities. Those rules include curfew hours; clean-up details; mandatory attendance at AA or NA meetings; and other rules almost inherent in institutional living. Oxford House™ is not an institution. It is more analogous to a family. However, certain rules may be required to assure an equitable distribution of the work in keeping the house clean and at times there may be the need for rules to keep some individuals from disrupting other individuals.[19]

Since the success of an Oxford House™ depends on having enough income to meet expenses, it is important that members pay their equal share of household expenses in a timely manner. Rules may be required that force the eviction of members who do not keep their equal share of household expenses up to date. All members should be encouraged to pay their share of household expenses at least one week in advance. The weekly house meeting becomes the ideal time to discuss this issue particularly if a resident is not up-to-date in paying the equal share of household expenses. It helps neither the individual resident nor the house group to let anyone get behind.

Officers

For an Oxford House™ to run successfully on a democratic basis, it must have certain elected officers. It is part of the Oxford House tradition to make sure that officers do not become so entrenched that other members of the house do not have an equal voice in its management. Therefore, it is an Oxford House tradition that no officer shall serve longer than six months in the same office for one continuous period of time.[20] All officers are but trusted servants of the entire membership. The number of officers may vary from House to House but all Houses generally have the following elected officers:

- President
- Treasurer
- Secretary
- Comptroller
- Coordinator

The election of both a treasurer and comptroller emphasizes the importance each Oxford House™ places on money management. The two officers are able to divide rent collection and help each other with the payment of bills. Houses elect a "Coordinator" to help schedule daily and weekly work details to keep the house clean – inside and outside.

The election of officers is necessary because they provide the leadership for the House to work well. The officers can serve continuously for only six months in any particular office, i.e. after an intervening six-month period an individual can be re-elected to an office in which he or she has already served. The duties of the various officers are designed to keep Oxford House™

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[19] For example, if a resident's non-attendance at AA or NA meetings is causing problems – for the individual or the house – the residents may vote at a meeting to require meeting attendance as a condition of living in the house. In this situation the "group conscience" should be the determining factor. It is guided by the fact that the welfare of the house must always come first. Long-term recovery is the primary reason for the house to exist.

[20] See Tradition Two

running smoothly by conduct regular weekly meetings of the House membership, assure that the Oxford House Traditions are followed, and keep the finances of the House in good order.

Meetings

It is important to have a House meeting at least once a week. After some experimenting, an Oxford House™ will find the particular hour or half-hour, which is the most convenient for most of its members. A meeting should be used to:

- report on the current financial status of the House;
- consider new applications for membership;
- resolve any problem affecting members in the House;
- resolve general complaints about maintenance of the House; and
- consider proposals or projects to be undertaken by the House

A special meeting should be called, just as soon as possible, whenever there is any suspicion that a member is drinking or taking drugs. Such meeting are the most difficult of any held in an Oxford House™. Some Houses have decided to use three of the elected officers as a screening committee for determining if an individual has violated the rule against drinking or taking drugs. In such cases, the screening committee makes its report to the full membership of the House for their consideration. The individual suspected of violating the rule against drinking or taking drugs should be directly confronted with the facts leading to the suspicion. The membership of the House then must vote on whether or not the facts support the conclusion that a member has violated the rule.

The decision by the House membership should be viewed simply as a factual determination. If a majority of the House membership attending the special meeting believes that the individual did in fact drink or take drugs, expulsion of that member is automatic.

The Secretary should take notes about what takes place at each House meeting. The notes of the previous meeting should be read at the beginning of the next meeting so that all the members can agree with the record of what the House had previously determined. If the Secretary has made a mistake in recording what had happened, it should be corrected. The approved minutes of a meeting should be made a permanent record of the House. The Secretary should also verify that vacancy updates have been made.[21] The next item of business should be the report on House finances by the Treasurer. That report should include: (a) the amount of the bills outstanding, (b) the cash on hand, (c) members' rent paid in advance, and (d) members' rent due. To the extent possible the Treasurer should project what the House finances are likely to be over the next month and take into account the expectation of any large utility bills or unusual expenses.

The House meeting should then take up new applications and listen to each member who has met or talked to the applicant. A vote should be taken on each applicant whether or not space is available. If the applicant is rejected, he or she should be told right after the meeting and encouraged to apply to another Oxford House. If the applicant is accepted, and space is available, he or she should be informed as to when to move in, who current officers are, money due to move in and given a copy of the manual -- so as to understand how Oxford House™

[21] Keeping vacancies accurate on the website is essential if a house is to have any creditability with treatment providers, drug court judges or the recovery community. The newcomer relies upon accurate vacancy data and every house should make sure that the Secretary updates the website at least once a week and that a current cell phone in the house is available for weekly vacancy verification.

works. If the applicant is accepted, but no space is immediately available, he or she should be put on a waiting list and told his or her prospects of getting in. Each new member should be told that the completed application constitutes agreement to follow the rules of the House.

Meetings also include discussion of the wide range of decisions facing an Oxford House™ – from purchases of wastebaskets to plans for opening a new House. The House meeting is the place to resolve any conflicts that arise from living together as a group. It is also a good place to pass on information about new AA or NA meetings or up-coming AA/NA related events. Staying sober and enjoying life is at the heart of Oxford House™ living.

Money

Oxford House™ is built on the principle of self-help. When it comes to money matters, this simply means that any House must be self-supporting and operate without debt – other than the start up loan that should be repaid on a regular basis. There may be exceptions when a House is first getting started. After a few weeks or months, a new Oxford House™ should be able to pay all of its operating expenses out of its equal share of household expenses.

Some expenses associated with an Oxford House™ are fixed. For example, the monthly rental payment will be a fixed amount. In addition, utilities (electric, gas or oil, telephone and often water) will be relatively fixed expenses. One area where expenses are controllable involves the purchase of food and supplies. All expenses, whether fixed or controllable, must be carefully watched so that any member at any time can know the exact financial condition of the House. Particular attention must be paid to cable TV expenses. If one or two members get a pay for view, they should reimburse the house. Usually the Comptroller is responsible to see that the members pay their share of the cable bill promptly so that the House is not faced with an unwanted and unwarranted expense.[22]

The President, the Treasurer, and Comptroller all have a responsibility for making certain that accurate records are maintained showing expenses and income of the House. Every Oxford House™ should have its own checking account and make certain to run all income and outgo through the checking account as the main control point for keeping track of money flow. The very first thing a new Oxford House™ does is to establish a checking account. At least three officers of the House should be authorized to sign checks with two signatures required on each check in order for it to be valid. Promptly deposit member's rent in the checking account and pay all bills by check.[23] That is the easiest and safest way to assure good recordkeeping. Do not use electronic payment except for start-up loan repayment and contributions to Oxford House World Services.

Each Oxford House™ should maintain (1) a membership ledger; (2) a cash receipts journal and (3) a cash expenses journal. The Treasurer is responsible for keeping these records and for posting the "Weekly Financial Status Report".

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[22] As a general rule an Oxford House™ gets cable TV with limited access to pay for view. However, if that is not possible the house should carefully monitor any "extra" expense over the basic system.

[23] Sometimes petty cash is useful for buying the staples the House will use. Usually petty cash is less than $100 and can be run through the checking account by making out a check for "cash". Receipts should then be kept for purchases made out of petty cash and on a weekly basis the Treasurer should balance the cash against the receipts in the petty cash fund. The Treasurer is usually the person who has control over the petty cash and pays individual members who make the purchases of staples for the House. A separate little book for petty cash is useful to maintain showing income and outgo. A small amount of petty cash is a good idea because checks for only a few dollars can become expensive when the bank charges for checks written.

The "Weekly Financial Status Report" lets everyone in the House know exactly the current financial condition of the House. It shows:

- money on hand the prior week;
- money on hand that week;
- bills paid during the last week;
- bills due during the current week;
- bills due by the end of the current month;
- members' rent paid in advance (total dollars);
- members' rent behind (total dollars) and
- status of individual members' payment history (paid in advance, up-to-date and behind) listed by member.[24]

The Treasurer and Comptroller are the two officers primarily responsible for assuring sound financial management for an Oxford House™. Together with the President, they should continually check and crosscheck the books so as to assure the true financial status of the House. At each weekly meeting, a report should be made to the full membership of the House for the membership to determine whether the equal share of household expenses is accurate and to decide if a member is too delinquent in paying to continue in the house.

Oxford House, Inc.

Oxford House, Inc., serves as an umbrella, non-profit corporation for all the Oxford Houses that have or will be given a charter. It is incorporated in the State of Delaware and is recognized as qualifying under Section 501(c)(3) of the Internal Revenue Code. The sole purpose of the umbrella organization is to serve the Oxford House™ movement. Each Oxford House™ has an equal voice in running Oxford House, Inc, consistent with the principle that each resident has an equal voice in the running of an individual Oxford House™.

Oxford House, Inc. is authorized to provide charters for individual Oxford Houses and operates a central services office to help existing houses stay on track and to help start new houses.

The World Council

Nine Oxford House™ residents are elected by vote of all of the Oxford Houses to serve staggered three-year terms as members of the Oxford House World Council, an advisory Board that recommends policies. Three alumni members of Oxford House™ are also elected to the 12-member World Council. Elections for one-third of the members are held each year at the annual Oxford House Convention. Meetings of the Oxford House World Council are held six times a year. Various committees of the World Council are established to address policy areas important to the worldwide network of Oxford Houses. The Chairperson of the World Council serves as a member of the Oxford House Board of Directors to assure that the corporation's services are consistent with the policies of the individual houses reflected by actions of the World Council.

The Board of Directors

The Oxford House Board of Directors oversees and governs Oxford House, Inc. – the umbrella 501(c)(3) nonprofit organization of the national network of individual Oxford Houses. One quarter of the Board members are alumni or resident members of Oxford Houses. The Board guides the external finances used for expansion and network maintenance.

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[24] There are no "secrets" in an Oxford House™. Members need to know whether the House is living on "borrowed money" (from rents paid in advance) or whether members are falling behind in rent in order to know how much needs to be charged for a House to be financially sound.

Oxford House Nine Traditions ...

TRADITION ONE

Oxford House™ has as its primary goal the provision of housing and rehabilitative support for the alcoholic and drug addict who wants to stop drinking or using drugs and stay stopped.

By the time many of us had stopped drinking, we had lost jobs; we had lost families, and some of us either had no place to live or no place to live which was not an invitation to start drinking again. Oxford House™ was founded not only to put a roof over our head, but also to create a home where the disease of alcoholism and drug addiction was understood and the need for the alcoholic and drug addict to stay away from the first drink or drug fix was emphasized.

Oxford House™ is group housing. The bond that holds the group together is the desire to stop drinking or using drugs and to stay stopped. Modest rooms and living facilities can become luxurious suites when viewed from an environment of alcoholics and drug addicts working together for comfortable sobriety.

When we stopped drinking or using drugs, we began to realize that in order to stay stopped, our lives would need to change. Alcoholics Anonymous and Narcotics Anonymous provided a framework for us to change physically, mentally, and spiritually. The degree to which we were able to successfully change our lives had a direct relationship to Alcoholics Anonymous and Narcotics Anonymous. Many of us soon learned, however, that living alone or living among our old drinking companions made it more difficult to practice the principles necessary for continued sobriety.

Some of us had lived for a time in alcoholic and drug rehabilitation facilities. Those facilities provided us with shelter, food, and therapy for understanding alcoholism and addiction. Initially, the structure and supervision of such facilities were acceptable because physically and mentally, we were exhausted. Later, some of us were to move into halfway houses, which provided shelter, food, and supervision. As our recovery progressed, the supervision and dependency on a halfway house created dissatisfaction. The dissatisfaction was in part the realization that we were shirking responsibility for our own lives and in part a resentment of authority. The third factor affecting us both in the rehabilitation facilities and the halfway houses was the realization that the duration of our stay must be limited because space must be made for others in need of help.

Oxford House™ grew out of the need for many of us to begin a new life without fear of backsliding because of loneliness leading to renewed dependency on former drinking companions or drug dealers. Throughout its tradition, Oxford House™ has combined the concepts of self-support and responsibility with a fellowship having the common purpose of continued and comfortable sobriety. Oxford House™ must always have as its primary goal the provision of housing and rehabilitative support for the alcoholic who wants to stop drinking and stay stopped and the drug addict who wants to stop using drugs and stay stopped.

TRADITION TWO

All Oxford Houses are run on a democratic basis. Our officers are but trusted servants serving continuous periods of no longer than six months in any one office.

During the last days of our drinking or using drugs, most of us ceased to function as responsible individuals. We were not only dependent upon alcohol and/or drugs, but were also dependent on many others for continuing our alcoholic and/or drug addicted ways. When we stopped drinking or using drugs, we began to realize just how dependent we had become. For those of us who had been in institutions or halfway houses, resentments against authority were common.

A major part of the Oxford House philosophy is that dependency is best overcome through an acceptance of responsibility. In Oxford House™, each member equally shares the responsibility for the running of the House and upholding the Oxford House tradition. All aspects of Oxford House operations, from the acquisition of the house to the acceptance or dismissal of members, are carried out under democratic procedures. Each member has one vote and majority rule applies except that 80% of the members must agree in accepting new persons for membership.

During our drinking and drug use years, and even before, many of us found it difficult to accept authority. Many individuals in society are able to abide by the strict letter of any rule, regulation, or law. Alcoholics and drug addicts seem to have a tendency to test and retest the validity of any real, potential, or imagined restriction on their behavior. As alcoholics and drug addicts, we became experts at outwitting "the system." As recovering alcoholics and recovering drug addicts, it has become important for us to learn how to live without ***the use of alcohol or drugs,*** within society.

By running Oxford House™ on a democratic basis, members of Oxford House become able to accept the authority of the group because the group is a peer group. Each member has an equal voice in the group and each has an opportunity to relearn responsibility and to accept decisions once they are made.

The opportunity for a house to democratically function requires periodic meetings within the house – at least once a week. Such meetings should be used to resolve any operational or personality problems facing the house.

Any group, in order to function effectively, needs leaders. Misguided leaders can create dependency and usurp self-responsibility. Oxford House™ should rely on democratically chosen leaders, but the leaders must always be but trusted servants. To discourage an excessive dependence on leaders, it is a principle of Oxford House™ that no member should serve in the same office for a continuous period of longer than six months.

TRADITION THREE

No member of an Oxford House™ is ever asked to leave without cause – a dismissal vote by the membership because of drinking, drug use, or disruptive behavior.

During early recovery for alcoholism and drug addiction, some members had to leave an institution in order to make room for an alcoholic or drug addict just beginning the recovery process. Other members were asked to leave halfway houses in order to make room for a recovering alcoholic or recovering drug addict who was ready to move into a halfway house. Only the very fortunate are able to make such a transition upon demand. Each individual recovers from alcoholism or drug addiction at a different pace. All too often, an abrupt transition from a protected environment to an environment that places considerable glamour on the use of alcohol and drugs causes a return to alcoholic drinking or addictive drug use.

There is no reason to believe that society as a whole has the responsibility to provide long-term housing within a protected environment for the alcoholic and drug addict. However, there is every reason to believe that recovering alcoholics and drug addicts can do for themselves that which society, as a whole, has no responsibility to do for them. Oxford House™ is built on the premise of expanding in order to meet the needs of recovering alcoholics and drug addicts. This principle contrasts sharply with the principle of providing the alcoholic or drug addict with assistance for a limited time period in order to make room for a more recently recovering alcoholic or drug addict.

One of the greatest threats to the sobriety of a recovering alcoholic or drug addict is loneliness. At a time when we acquired a serious desire to stop drinking or using drugs, many of us had lost our families and friends because of our alcoholism and/or drug addiction. Too often, newly recovering alcoholics and drug addicts are faced with the necessity of living alone and of relying solely on contacts with Alcoholics Anonymous and Narcotics Anonymous to stay sober. Some are able to keep from drinking in spite of the loneliness. Others are not so fortunate. The alcoholic or drug addict alone begins to compare himself to those members of Alcoholics Anonymous and Narcotics Anonymous who still have family and friends. Loneliness and self-pity soon lead such individuals back to alcoholic drinking or drug use. With Oxford House™ there is no need for a recovering individual to live in an environment dominated by loneliness.

The only members who will ever be asked to leave an Oxford House™ are those who return to drinking, use drugs, or have disruptive behavior, including the nonpayment of an equal share of household expenses. No Oxford House™ can tolerate the use of alcohol or drugs by one of its members because that threatens the sobriety of all of the members. Neither can an Oxford House™ function if some do not pay their fair share of the costs.

It is obvious why Oxford House™ must strongly protect the sobriety of its other members by asking the drinking member or member using drugs to leave. The line between an Oxford House™ of recovering alcoholics or drug addicts and an Oxford House™ of active alcoholics or drug addicts is a thin one. A member's tenure is absolutely secure in an Oxford House™ as long as he does not drink or use drug, keeps his share of household expenses up to date and is not disruptive.

TRADITION FOUR

Oxford House™ is not affiliated with Alcoholics Anonymous and Narcotics Anonymous, organizationally or financially, but Oxford House members realize that only active participation in Alcoholics Anonymous and/or Narcotics Anonymous offers assurance of continued sobriety.

Every Oxford House member attributes his sobriety to Alcoholics Anonymous and/or Narcotics Anonymous. Each Oxford House member, as an individual, considers himself a member of AA and/or NA. Without that, sobriety would be short-lived.

As individual members of Alcoholics Anonymous, Oxford House members are keenly aware of the Sixth Tradition of AA, which is:

> *An A.A. group ought never endorse, finance, or lend the A.A. name to any related facility or outside enterprise, lest problems of money, property, and prestige divert us from out primary purpose.*

In deference to that tradition, Oxford House™ has never sought nor obtained sponsorship from any AA or NA group. Oxford House members value the Sixth Tradition of Alcoholics Anonymous (and Narcotics Anonymous) too greatly for themselves to try to get either movement deeply involved in the organizing, financing, or sponsorship of any Oxford House™. However, Oxford House members firmly believe that the Oxford House concept can expand as an independent entity, while fully utilizing the benefits of Alcoholics Anonymous and/or Narcotics Anonymous.

In fact, Oxford House™ creates an environment whereby each member can more fully realize the benefits available from active AA or NA membership. A house full of sober, recovering alcoholics and drug addicts invites informal AA or NA "meetings after the meeting" and each day finds many informal AA or NA meetings before individual members each go off to their regular AA or NA meeting.

An underlying principle of Oxford House™ is that each individual member has the ability to be responsible for himself or herself. Living within an Oxford House™ provides both the opportunity and motivation for all residents to regularly attend AA and/or NA meetings. The example of Oxford House members going to AA or NA meetings on their own is contagious. It has been the experience of Oxford House™ that participation in AA and NA is extremely high in an environment where one individual can see another individual, with the same disease, reaping great benefits from AA and/or NA participation.[25]

As an organization Oxford House™ is not part of AA or NA. However, the members of Oxford House™ have found that only by being active in AA and/or NA have they found comfortable, long-term sobriety – for themselves and the Oxford House™ in which they live.

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[25] **If a resident's non-attendance at AA or NA meetings is causing problems – for the individual or the house – the residents may vote at a meeting to make meeting attendance for a particular member a condition of living in the house. In this situation the "group conscience" should be the determining factor. It is guided by the fact that the welfare of the house must always come first.**

TRADITION FIVE

Each Oxford House™ should be autonomous except in matters affecting other houses or Oxford House, Inc., as a whole.

Each Oxford House™ is self-supporting and self-run. The members of an Oxford House™ assume full responsibility for the operation of the House. The members themselves in a democratic fashion determine the equal share of household expenses that is charged the members. The rules that govern the house are for the most part made by those who live in a particular Oxford House™.[26] Such autonomy is essential for the Oxford House system to work.

The reason that each Oxford House™ is independent arises from the very practical consideration that those who are closest to a situation are best able to manage it. If an Oxford House™ follows the democratic principles and traditions of Oxford House, Inc., it should have no difficulty in running smoothly. Those democratic principles will also enable the members of a particular Oxford House™ to take pride in their newfound responsibility.

The charter of each Oxford House™ requires that an Oxford House™ meet certain minimum requirements of Oxford House, Inc. First, an Oxford House™ must be democratically self-run following the Oxford House Manual©. Second, an Oxford House™ must, in essence be a good member of the community by obeying the laws and paying its bills. Third an Oxford House™ group must immediately expel any resident who returns to drinking alcohol or using drugs.

Failure to adhere to any of these three requirements would bring the entire Oxford House concept into question. Therefore, it is important that each Oxford House™ meet these minimum responsibilities in order for its charter to be continued.[27] Oxford Houses are both autonomous and self-supporting. All Oxford Houses have been careful to avoid undue dependence on government or other outside funds.

Each local Oxford House™ votes annually in convention to elect the national Oxford House World Council. Nine members of the Oxford House World Council are elected by all the individual Oxford Houses and must be a resident of an Oxford House when they are elected. Three of the World Council members are alumni and are elected by the houses and the alumni in attendance at the annual world convention. The organization was deliberately set up to assure that each Oxford House™ is autonomous and that overall policy of the Oxford House movement reflects the will of the majority of individual Oxford Houses.

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[26]Rules against anyone living in an Oxford House™ who uses alcohol or drugs are universal with all houses. For obvious reasons, an individual house cannot establish different rules in this regard because such rules would run entirely counter to the primary purpose and functions of the Oxford House System.

[27]At this point in the text the original Oxford House Traditions, which were written when the first Oxford House™ began in the Fall of 1975, stated: "At this time, it also appears that Oxford Houses can be totally self-supporting. By that, we mean that a minimum amount of government support or private support may be accepted for start-up purposes." Some states have recovery house revolving loan funds to help a new house get started. This grew out of §2036 of PL 100-690, the federal Anti-Drug Abuse Act of 1988, and has served as an important catalyst for the expansion of Oxford Houses.

TRADITION SIX

Each Oxford House™ should be financially self-supporting although financially secure houses may, with approval or encouragement of Oxford House, Inc., provide new or financially needy houses a loan for a term not to exceed one year.

Oxford House™ was built on the unique concept that its members should try to expand the number of beds available – rather than turn existing members out of the house after a set period of time. In carrying out that concept, Oxford House-Silver Spring, shortly after it started, put up over $1,200 in order to start Oxford House-Washington. Later Oxford House-Washington did the same for the start-up of another House. From the beginning, existing Oxford Houses helped new ones get started. Once a new House gets on its feet, it pays back the older Houses, which had loaned it money, and stands ready to help another new House.[28]

When an Oxford House™ first starts, it is generally necessary for the members to pay a slightly higher rent than what they pay once the House is established. There are two reasons for this pattern. First, there are start-up costs associated with the beginning of any new house such as security deposits, supplies and furnishings.[29] Second, when a House first starts it takes some time to fill all the beds. As all the available beds in a House become full the members can decide whether to lower the equal share of household expenses or begin to develop a small surplus. As a practical matter, most houses choose to have a surplus of one month's expenses. Once having obtained that surplus, it then decides whether to lower the weekly equal share of household expenses or to accumulate money for the beginning of a new house – or to do both.

Starting new Houses through the mutual assistance of existing Oxford Houses is a tradition because each House was started with the help of existing Houses and tends to pass on to others that which they received. Once more applications are received than there are beds available, the members of any Oxford House™ will begin to look around for another suitable house. When they find such a house they will bring it up with the other existing Houses and if there is a consensus they will attempt to find the start up money and members to fill the new house. Often several members of an existing House will move into the new House to provide a core group of new members who already know how an Oxford House™ works.

Oxford House, Inc. acts as the coordinating body for providing charters for the opening of new Oxford Houses. It also acts as the coordinating body to help individual houses to organize mutually supportive chapters. Through chapters individual houses are able to share their experience, strength and hope with each other to assure compliance with the Oxford House concept and its respected standardized system of operations.

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[28] Numerous Oxford Houses have been opened since 1975. Some operate for several years and then, because of expiration of a lease, dissatisfaction with the facilities, or simply the finding of a better location, the members of a particular House will move into a new location. Other Houses often help that type of move as well as the start-up of new Oxford Houses. In both cases, financial assistance is in the form of a loan having a pay back schedule, not to exceed one year, defined up front. (Since 1989, many new Oxford Houses have taken advantage of state revolving loan programs. Repayment from those start-up loans assures the continuation of the revolving fund to enable other new houses to get started – just as repayment of loans to chapters permits the same resources to be used again and again.)

[29] For example, the landlord and phone company may require a security deposit and, while furnishings are generally donated, members will often have to rent a truck in order to pick them up. There may also be a need to buy more "staples" such as flour, sugar, coffee, cleaning supplies, etc. when a new House starts up

TRADITION SEVEN

Oxford House™ should remain forever non-professional, although individual members may be encouraged to utilize outside professionals whenever such utilization is likely to enhance recovery from alcoholism and drug addiction.

It is inconsistent with the Oxford House system of democratic rule to have a professional manager of Oxford House™. Likewise, it is inconsistent with the Oxford House concept to have a requirement placed on members to utilize the services of psychiatrists, doctors, or even the program of Alcoholics Anonymous or Narcotics Anonymous except in very special circumstances.

Within an Oxford House group, it is not unusual to find some members who have problems that cannot be dealt with by the group. In those situations, it is not uncommon for the Oxford House members, at a meeting, to strongly suggest that a fellow member seek professional help. In those situations where a member's behavior is disruptive to the group as a whole, the member may be required to seek such professional help or attend more self-help meetings in order to avoid being dismissed from Oxford House™.

One can only be dismissed from an Oxford House™ because of drinking, using drugs, non-payment of rent, or disruptive behavior. Members should be careful not to abuse the dismissal process. Every opportunity should be given to a member who needs professional help to see that he obtains it.

Nearly all members of Oxford House™ utilize the AA and/or NA program in order to obtain and keep a comfortable sobriety. However, an Oxford House™ relies primarily upon example for assuring a high percentage of AA and/or NA attendance from its members. Formal AA or NA meetings are not held in an Oxford House™. However, every member who has maintained comfortable sobriety in an Oxford House™ makes it a practice to attend a lot of AA and/or NA meetings on a regular basis.[30] If a house member does not regularly attend AA or NA meetings, the house may – as a group conscience – decide that an individual resident should attend a set number of meetings each week for both the individual's well-being and the well-being of others who live in the house.

Individuals living in each of the Oxford Houses have also been responsible for starting many new groups of Alcoholics Anonymous or Narcotics Anonymous with meetings near an Oxford House™. This not only helps those individuals to become more involved in AA or NA, and thereby reap greater individual benefits, but also helps to build strong bonds between local AA and NA groups and Oxford House™.

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[30] The 1988 Spring Survey of Oxford House members showed that the average member attends six AA or NA meetings a week. Subsequent annual surveys of Oxford House residents all around the country have confirmed that Oxford House residents attend an average of between five and six AA or NA meetings a week. There are two primary reasons 12-step meeting are not held in an individual Oxford House: [a] it is good for individuals in recovery to get into the habit of attending 12-step meetings in the community, and [b] it is unfair to house members and neighbors to collect a lot of cars in the neighborhood for regular 12-step meeting at the house.

TRADITION EIGHT

Propagation of the Oxford House, Inc. concept should always be conceived as public education rather than promotion. Principles should always be placed before personalities.

Those who have benefited from living in an Oxford House™ have acquired enthusiasm for the Oxford House concept. In their enthusiasm, they have been anxious to share Oxford House™ with any recovering alcoholics and drug addicts who want to establish an Oxford House™ in their community.

Every Oxford House member stands ready to explain the workings of his House and the benefits derived there to anyone anywhere. No personal gain is derived from any Oxford House™ promotion. It should also be pointed out that Oxford House, Inc. in no way gains from the creation of new Oxford Houses. It has been formed as a non-profit tax-exempt corporation and will continue to operate as one both according to the letter and spirit of the law.

It is not easy to spread the word of a new concept or an old concept with a new twist. Propagation, or spreading the word, of the Oxford House concept is given the highest priority by the members of Oxford House™.

Before spreading the word, an individual Oxford House™ should make certain that it is sufficiently established to undertake public discussion of it goals and mission. The best sales pitch for spreading the word about Oxford House™ is simply the establishment of a sound Oxford House™ and a straightforward discussion of what it is, how it works and why it is needed.

As with any group or organization, there will be some individuals who will be so impressed with the Oxford House concept that they will become "super salesmen." Each super salesman should be keenly aware that the Oxford House concept is one based on principles rather than personalities. The situation should be avoided whereby certain individuals will begin to equate their persuasive qualities with the Oxford House concept. The concept and the standardized, democratic, self-supported Oxford House system of operations itself are far more persuasive than any individual. Be honest and straightforward when sharing the Oxford House concept with others.

The Oxford House concept is a sound one, based on sound principles, and has demonstrated its worth with an established track record. We should spread the word about Oxford House™, but be wary of individuals who place their own personalities before the principles that made Oxford House™ work. Oxford Houses are dedicated to recovery and group support; not individual gain.

TRADITION NINE

Members who leave an Oxford House™ in good standing are encouraged to become associate members and offer friendship, support, and example to newer members.

While no one is ever asked to leave an Oxford House™ without cause, some individuals will simply outgrow living in an Oxford House™. They will return to their families; they may start new families; they may simply move into another living situation.

Once a member has left an Oxford House™, he or she should be encouraged to become active in the Oxford House Alumni Association. Many alumni members continue to be associated with their former Oxford House™ as an associate house member. The associate member should be encouraged to attend House meetings, but a local house may decide that his voting privileges are somewhat less than those who live in the House. Such a restriction of voting privileges makes sense and should not discourage members who leave in good standing from becoming associate members of their former house or chapter.

Gratitude is a feeling that most alcoholics acquire sometime during their recovery process. Often, recovering alcoholics and drug addicts find it difficult to adequately express their gratitude. The alumni member of Oxford House™ is in the enviable position of being able to be of service in an environment in which he has total understanding. The alumni member can offer friendship, support, and an example to the active members of an Oxford House™.

Moreover, the alumni member can often provide assistance in forming new Oxford Houses or in recruiting new members who want to live in an Oxford House™. Above all the associate member serves as an example of one who lived in an Oxford House™ and "made it."

All Oxford Houses should encourage members who leave in good standing to maintain a continuous link with their Oxford House™ experience. The welcome mat should be out to any associate member and contacts between associate members and active members should be encouraged.[31]

To the extent possible, each Oxford House™ should keep Oxford House, Inc. up-to- date with the current address of Alumni Members who have left the House in good standing, so that they can receive the "Oxford Grape" and other Oxford House newsletters.[32]

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[31] Many former residents of Oxford Houses, who left their particular house clean and sober, become members of the national Oxford House Alumni Association. The Alumni Association is a fellowship of former Oxford House™ residents who share their experience, strengths and hope in order to expand the Oxford House™ movement and keep it operating and expanding in a way to assure other recovering individuals the same opportunity they have enjoyed.

[32] Names and addresses of Alumni Members and inquires concerning the Oxford House Manual© should be sent to Oxford House, Inc. 1010 Wayne Avenue, Suite 300, Silver Spring, Maryland 20910. A cooperative effort by both alumni and active house members can help keep successful members of Oxford House™ in touch with the Oxford House family. Most Oxford Houses honor their members who leave in good standing by awarding them a certificate of accomplishment and the first year's membership in the Oxford House Alumni Association. At the website: www.oxfordhouse.org one can go to "Contact Us" and register the name and current address of alumni members.

OXFORD HOUSE SYSTEM CHECKLIST

MONEY

- **Set up a checking account for each Oxford House™**
  - Obtain a federal tax identification number
  - Get name of House and address on each check
  - Require at least two signatures to write a check
  - Record all deposits, checks drawn and service charges
  - Run all income and expenses through account
  - Post monthly statement so all members of House can see
- **Set weekly equal share of household expenses to cover costs**
  - Figure monthly expenses (rent, utilities, staples)
  - Divide by number of beds likely to be occupied
  - Add a small amount to enable House to have a reserve
  - Remember that any shortfall has to be made up by other residents if any of the house recovery beds are not occupied
- **Collect equal share of household expenses in advance**
  - Usually a House sets a rule of one or two weeks in advance
  - Do not let members get behind in equal share of household expenses
  - If a member is two weeks behind confront the member at the weekly meeting
  - Discuss hardship cases at a meeting before accepting a new member – sometimes, it may be necessary to take into account the fact that an individual just out of rehabilitation will have to get a job in order to get rent money
- **Utilities**
  - Remember electric bill is higher in summer
  - Remember fuel bill is higher in winter
  - Pay for view cable TV programs must be paid by user unless a house vote
  - Protect against "pay for view" or "900" telephone calls

ALCOHOL AND DRUGS

- **Sobriety**
  - Sobriety is the primary purpose of an Oxford House™
  - Make no compromise
  - Frequently go to AA /NA meetings but rely on "attraction" rather than mandates – AA/NA meetings should be outside the house
- **Alcohol or drug use**
  - As soon as use is suspected call a special meeting
  - When a majority vote confirms use expulsion results
  - If drunk or high, member should leave immediately
  - If passive, leave the next morning
  - Make no exceptions
  - Establish a *readmission* guideline of thirty days sobriety
  - Accept the fact that the House welfare is more important than any individual
  - Accept the fact that "tough love" stops relapses

OFFICERS

- **House President**
  - Elected for six-month term
  - Must be resident of House
  - Calls and leads weekly and special meetings
  - Cannot succeed himself but can be elected to the same office after six months have elapsed

- **House Treasurer**
  - Elected for six-month term
  - Must be resident of House
  - Responsible for maintaining House financial records
  - Keeps membership informed about financial condition
  - Cannot succeed himself but can be elected to the same office after six months have elapsed

- **House Secretary**
  - Elected for six-month term
  - Must be resident of House
  - Responsible for recording minutes of House Meetings
  - Before each weekly meeting assures that vacancy updates have been made and the vacancy contact cell phone is accurate
  - Sends thank you notes to contributors
  - Cannot succeed himself but can be elected to the same office after six months have elapsed

- **House Comptroller**
  - Elected for six-month term
  - Must be resident of House
  - Responsible for collection of equal share of expenses and reports to house
  - Balances books with Treasurer prior to each meeting
  - Responsible for annual survey completion and transfer to website
  - Cannot succeed himself but can be elected to the same office after six months have elapsed

- **House Coordinator**
  - Elected for six-month term
  - Must be resident of House
  - Assigns and reviews house chores
  - Cannot succeed himself but can be elected to the same office after six months have elapsed

The goal of every Oxford House is to be an example to everyone in recovery of the way to become comfortable enough in sobriety to assure long-term recovery without relapse. In brief, every Oxford House is a "*Good Neighbor and a Good Citizen.*"

Staying Connected

Every Oxford House stays connected in order to share strength, experience and hope with other Oxford Houses, Oxford House World Services, the treatment community, drug courts, researchers and all in the recovery community. At the heart of staying connected is the Oxford House website: www.oxfordhouse.org and use of the house's assigned email.

The elected **Secretary** of each Oxford House makes sure that vacancy updates are reported whenever there is a change but at least every week following the established procedure and reports that fact at the weekly house meeting. The vacancy information is kept up-to-date because it is important to be credible. Credibility means that the information on the website should be correct. Remember that finding a safe place to live was a tough job for each of us. We were often frustrated. One frustration was learning that a house reportedly had a vacancy but then finding out there was no vacancy. The least each of us can do for the newcomer to recovery seeking a safe place to live is to make sure that our vacancy data is correct – if for no other reason to protect the good name of our house among counselors and members of the recovery community who are trying to help the newcomer to find a safe place to live. No counselor or twelve-stepper will refer anybody to Oxford House if they are consistently misled by the vacancy information on the Oxford House website or if the telephone contact number is wrong or never answered. Now that every house has been assigned an email address, answering email promptly can be a good way to set up interviews and fill vacancies.

The elected **Comptroller** of each house is responsible for making certain that the house has an assigned email account. Beginning in September 2012, every new house will get an assigned email address when it gets its charter. Check the website for how houses existing before that date can get an assigned email address. The Comptroller should check the email on a daily basis to follow-up on new applicants and to know when to organize the house's annual survey questionnaire response.

If an Oxford House does not have a computer or an Internet connection, get one. Computers have come down in price and a fast Internet connection costs much less than cable TV. Donated hand me down computers are also okay. Ask in the community for donations of computers. Keeping connected and up-to-date is important. The web also has much research information about behavior that is likely to assure long- term recovery.

Protecting House and Chapter Finances

The key to making any Oxford House work well is to have a weekly house meeting. Avoid thinking that, "Things are going so well we only need to meet once every two weeks or once a month." Experience has shown that whenever a house fails to have a regular weekly house meeting, trouble is just around the corner. The standard forms in the Oxford House Manual©, the Oxford House Chapter Manual©, and on the website are blueprints or maps for staying on track during a house or chapter meeting. Use them and if you have any questions use the hotline or web contact form to get an answer or explanation from Oxford House World Services.

When an Oxford House is established it gets its own unique Federal Employer Identification Number [FEIN] from the Internal Revenue Service because that number is needed to establish a house checking account. Write the FEIN number in the House Record Book so that future residents in the house will have it. Also, make certain that Oxford House World Services has a copy of the number in their database. When the House Secretary checks into the website, he or she should verify house data on the World Services database. If the FEIN number is blank, please provide one. Your bank can tell you the FEIN number if your house has misplaced it.

All Oxford Houses require two signatures for checks drawn on their checking accounts. Most Oxford Houses write checks for paying bills during their regular house meeting. That way everyone knows that the house money – which belongs to all the house members – is being properly spent. Between house meetings, the house checkbook should be locked up in a safe place. A simple lock box can be purchased at office supply stores like Staples, Office Max or Office Depot. The President, Treasurer and one other officer should have a key or know the combination code for opening the lock box. This ritual underscores how important it is to keep house money safe. Remember not to use electronic payments for paying bills except for start-up loan repayment or contributions to Oxford House, Inc. That makes certain that all expenditures on behalf of the house are easily documented and approved by all the house members. Also do not vote the same person as treasurer of house, chapter and state association.[33]

The best safeguard for protecting finances in a house or chapter or state association is to make the financial data available to all members of the house or chapter or state association. Transparency is the best safeguard against stealing by dishonest members. The audit forms and procedures ensure transparency. The Treasurer of the House should report current house finances at each weekly house meeting. The Comptroller should work with the Treasurer to conduct a monthly audit of house or chapter funds to make sure careless mistakes in addition or subtraction do not misrepresent how much money is on hand, paid out or due.

Finally, don't let residents get behind in paying their equal share of expenses. Everyone in recovery must be responsible. Our past addictive behavior often led us to put off doing things until tomorrow. When we were using, "tomorrow" never came; now that we are clean and sober, doing things we need to do today protects our sobriety. When it comes to house finances, diligence protects the house, the chapter and Oxford House as a whole.

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[33] See World Council Resolution # 42. Voting different individuals to be in charge of membership money at different levels of the organization is a sound "check and balance" to avoid embezzlement.

Application For Membership In Oxford House

To be accepted in an Oxford House an applicant must complete both sides of this application and be interviewed by the residents of the particular Oxford House to which the applicant is applying. The residents of the house then vote on acceptance. An 80% affirmative vote is needed to be accepted. Carefully read the application and honestly answer the questions. Living in an Oxford House is special and if you understand its value it can help you achieve comfortable sobriety without relapse.

1. Print Name (Last, First, Middle)			3. Date of Birth Month / Day / Year	
2. Present address (Street) Check if treatment facility ☐			4. Phone Where You Can Be Reached Home ( )	
City	State	Zip	Work ( )	
5. Are you an Alcoholic? ☐ Yes ☐ No		6. Date of Your Last Drink?	9. List drugs you used addictively:	
7. Are you addicted to drugs? ☐ Yes ☐ No		8. Date of last drug use?		
10. When did you attend your first AA or NA meeting?			11. How many AA/NA meeting do you now attend each week?	
12. Do you want to stop drinking alcohol and using addictive drugs? ☐ Yes ☐ No			13. Are you employed? ☐ Yes ☐ No If "yes" who is your employer?	
14. Are you getting welfare or other non-job related income? ☐ Yes ☐ No If "yes" what?			15. If you do not have a job will you get one? ☐ Yes ☐ No If "yes" what job plans do you have?	
16. What is your monthly income right now? $_____			17. What do you expect your monthly income to be next month? $ _____	
18. Marital status [Check One] ☐ Married, ☐ Never Married, ☐ Separated, ☐ Divorced			19. Do you have a medical doctor? ☐ Yes ☐ No If "yes" list the doctor's name and phone number:	
20. Have you ever been to a treatment facility for alcoholism and/or drug addiction? ☐ Yes ☐ No **If "yes" list** the treatment provider, phone number and primary counselor, if any.			21. Do you take prescription drugs? ☐ Yes ☐ No If "yes" list drugs and reason the drug has been prescribed.	
Please complete the other side of this application. →				

Telephone (301) 587-2916 • Facsimile (301) 589-0302 • Website: www.oxfordhouse.org

22. Date of move in ? ☐ Immediately ☐ Other -- If "other" list the date you would want to move in, if accepted, and why the date is in the future rather than immediately. Date: _____ Reason:

23. Have you ever lived in an Oxford House before? ☐ Yes ☐ No If "yes," provide the name and location of the Oxford House below and answer question 24.

24. [Answer this question if the answer to question 23 was "yes."] I left the previous Oxford House for the following reason: [check one]

☐ relapse, ☐ voluntarily, ☐ other reason(s) _____

I, did ☐ or do not ☐ owe money to the Oxford House I left. If I did owe money to the Oxford House I left, I will agree to repay the money I owed to my former Oxford House. ☐ Yes ☐ No

25. Emergency Telephone Numbers. [[List family doctor, if you have one, + two family members or friends]

Name and Address	Relationship	Telephone
1-		
2-		
3-		

26. I realize that the Oxford House to which I am applying for residency has been established in compliance with the conditions of § 2036 of the Federal Anti-Drug Abuse Act of 1988, P.L. 100-690, as amended, which provides that federal money loaned to start the house requires the house residents to (A) prohibit all residents from using any alcohol or illegal drugs, (B) expel any resident who violates such prohibition, (C) equally share of household expenses including the monthly lease payment, among all residents, and (D) utilize democratic decision making within the group including inclusion in and expulsion from the group. In accepting these terms, the applicant excludes himself or herself from the normal due process afforded by local landlord-tenant laws.

27. Use this space for additional relevant information:

28. I have read all of the material on this application form including the limitations set forth in item 26. I have also answered each question honestly and want to achieve comfortable recovery from alcoholism and/or drug addiction without relapse.

SIGNATURE: _____ DATE: _____

FOR USE BY OXFORD HOUSE

ACCEPTED NOT ACCEPTED MOVE IN DATE _____ MOVE OUT DATE _____

HOUSE KEYS RETURNED YES NO OUTSTANDING DEBT TO HOUSE $_____ DATE REPAID _____

Visit website: www.oxfordhouse.org for nearest Oxford House to you

WEEKLY OXFORD HOUSE FINANCIAL STATUS REPORT

Name of House	Number of Weekly Report

Week Of: _____TO_____20____

CASH IN BANK
START OF THIS WEEK

CHECKING ACCOUNT BALANCE	+	SAVING ACCOUNT BALANCE	=	$

DATE	DEPOSITS AND MONEY RECEIVED AT THIS MEETING OR SINCE LAST DEPOSIT [LIST BY SOURCE]	AMOUNT	

TOTAL MONEY RECEIVED: (ADD TO AMOUNT AT TOP OF PAGE TO SHOW "CASH + RECEIPTS")			CASH + RECEIPTS $

CASH + RECEIPTS FROM FRONT

EXPENDITURE BY CHECK AND CASH				$
DATE	PAID TO AND PURPOSE	CHECK NO.	AMOUNT	
SUBTRACT TOTAL MONEY PAID OUT:				$

BILLS TO BE PAID (Future bills due within 30 days)			
DATE DUE	TO WHOM AND FOR WHAT	AMOUNT	
TOTAL			

ENTER DIFFERENCE BETWEEN AMOUNT PAID OUT AND CASH + RECEIPTS

Carry forward this amount to the next weekly financial report. Remember to number each sheet for easy reference of one week from the next.

Oxford House Monthly Reconciliation and Financial Audit

HOW TO RECONCILE YOUR HOUSE CHECK BOOK –

Reconcile your checking account every month when you receive your Bank Statement. The following easy steps will help you do the job.

HOUSE NAME	MONTH/YEAR OF:

Step 1. CHECK (") AMOUNTS SHOWN ON YOUR STATEMENT AGAINST AMOUNTS ENTERED IN YOUR CHECK BOOK.
Step 2. LIST BELOW THE CHECKS WRITTEN DURING THE PERIOD WHICH ARE NOT RECORDED ON YOUR BANK STATEMENT.
Step 3. LIST BELOW THE DEPOSITS MADE DURING THE PERIOD WHICH ARE NOT RECORDED ON YOUR BANK STATEMENT.
Step 4. ADJUST YOUR CHECK BOOK BALANCE BY SUBTRACTING ANY SERVICE CHARGES NOTED ON YOUR STATEMENT.
Step 5. Add the deposits not recorded to the statement balance and subtract the amount of outstanding checks plus service charges.

Apply the five steps above by filling in the form below. The result arrived at in the "AUDITED HOUSE ACCOUNT" box is the amount of money a house has available at the end of the period. This completes an audit of the checking account. If your house has a savings account, audit it using the steps on the other side of this form.

House Checking Account Audit:

BANK STATEMENT DATE

DEPOSITS NOT ON YOUR STATEMENT		
DATE	AMOUNT	
ENTER STATEMENT ENDING BALANCE	+	TOTAL OF ITEMS NOT DEPOSITED

CHECKS NOT ON YOUR STATEMENT			
NUMBER AND DATE	AMOUNT		
=	SUB TOTAL	-	MINUS TOTAL OUTSTANDING CHECKS
AUDITED HOUSE ACCOUNT →		$	

1. HOUSE TREASURER, COMPTROLLER AND PRESIDENT SHOULD WORK TOGETHER TO COMPLETE EACH MONTHLY AUDIT OF HOUSE FUNDS.

2. AFTER COMPLETING THE AUDIT EACH SHOULD SIGN THE OTHER SIDE OF THIS FORM AND THEN POST THE FORM SO EVERYONE IN THE HOUSE KNOWS THE FINANCIAL STATUS.

Oxford House Monthly Reconciliation and Financial Audit

The summary of the financial status our Oxford House at the end of the month is computed below by filling in the right amounts and adding or subtracting:

House Savings Account Amount in the Bank	→	$
	Plus	
House Checking Account Amount in the Bank	→	$
	Plus	
Amount to be Deposited in Savings Account	→	$
	Plus	
Amount to be Deposited in Checking Account	→	$
	Minus	
Total of Bills Due	→	$
Available Funds	→	$
	Plus	
Money Owed the House	→	$
Total Funds Available When All Money Owed the House is Paid	→	

List below the individuals who are behind in paying their equal share of household expenses.

Name	Amount Owed	Name	Amount Owed

Auditing Officer's Initials

President Date:

Treasurer Date:

Comptroller: Date:

DATE MOVED IN	
SOBRIETY DATE	

OXFORD HOUSE

INDIVIDUAL MEMBER RECEIVABLE LEDGER

NAME OF MEMBER

	AMOUNT DUE	DATE PAID	DATE LEFT HOUSE	REASONS	AMOUNT REFUNDED		DATE REFUNDED
EQUAL EXPENSE SHARE [EES] ENTRY FEE							

EQUAL EXPENSE SHARE [EES] **+** **MISCELLANEOUS EXPENSES** [phone/fines/other] **= TOTAL DUE**

WEEK OF	EES PAYABLE	AMOUNT PAID	DATE PAID	BALANCE	ITEM	AMOUNT PAYABLE	AMOUNT PAID	DATE PAID	BALANCE	TOTAL BALANCE

34

Keep a weekly report on individual resident's payments and amount due. Do it by the week even if payment may cover a longer period. [SIDE 1]

NAME OF MEMBER [SIDE 2]

EQUAL EXPENSE SHARE [EES] + **MISCELLANEOUS EXPENSES** [phone/fines/other] = **TOTAL DUE**

WEEK OF	EES PAYABLE	AMOUNT PAID	DATE PAID	BALANCE	ITEM	AMOUNT PAYABLE	AMOUNT PAID	DATE PAID	BALANCE	TOTAL BALANCE

START A NEW LEDGER SHEET AS REQUIRED BUT KEEP EACH INDIVIDUAL'S LEDGER SHEETS TOGETHER IN A LOOSE LEAF NOTEBOOK. GOOD RECORDS PREVENT MISUNDERSTANDINGS AND HELP ALL MEMBERS OF THE GROUP TO PAY AN EQUAL SHARE OF HOUSEHOLD EXPENSES.

HELP BUILD AN ACTIVE OXFORD HOUSE ALUMNI ASSOCIATION BY PROVIDING YOUR CHAPTER OR OXFORD HOUSE WORLD SERVICES WITH THE NEW ADDRESS OF ANY MEMBER WHO MOVES OUT ON GOOD TERMS.

OXFORD HOUSE

Weekly Summary Report

ACCOUNTS RECEIVABLE JOURNAL

NAME OF HOUSE

AS OF THE WEEK OF: MONTH - DAY

	MEMBER'S NAME [Or other person or entity owing the house money]]	Weekly Equal Expense Share [EES]		EES Deposit		Miscellaneous Items		Fines		Balances Due	
1.											
2.											
3.											
4.											
5.											
6.											
7.											
8.											
9.											
10.											
11.											
12.											
	TOTALS →										

This form is completed by the Comptroller each week, presented at the weekly House Meeting and made available for house members to know who has paid up-to-date and who owes money.

NAME OF HOUSE:

OXFORD HOUSE
COORDINATOR'S REPORT

Assign Work Details To Keep Common Areas Clean. [List member's assignments and rotate jobs so that everyone equally shares work to be done.]

ACTIVITY	Week No. 1 NAME		Week No. 2 NAME		Week No. 3 NAME		Week No. 4 NAME		Week No. 5 NAME	
1. Living Room										
2. Kitchen										
3. Laundry Room										
4. Hall/Stairs										
5. Bathroom No. 1										
6. Bathroom No. 2										
7.										
8.										
9.										
10. Yard - Front of House										
11. Yard - Rear of House										
12. SAFETY (Working smoke alarms, extinquishers & exit doors)										

Chores should be done on a daily basis. Before each regular house meeting Coordinator should score each chore in the box next to the assigned member's name as follows: to indicate: "completed in a satisfactory manner;" **X** to indicate: "not completed in a satisfactory manner."

If a chore is not completed in a satisfactory manner, the Coordinator should report to the full membership at the house meeting and the group may decide to assess a fine or penalty. All fines or penalties must be approved by a vote of the group.

Coordinator's Signature

Date

OXFORD HOUSE TRADITIONS

1. Oxford House has as its primary goal the provision of housing for the alcoholic and drug addict who wants to stay clean and sober.

2. All Oxford Houses are run on a democratic basis. Our officers serve continuous periods of no longer than six months.

3. No Member of an Oxford House is ever asked to leave without cause -- drinking, drug use, or disruptive behavior.

4. Oxford House members realize that active participation in AA and/or NA offers assurance of continued sobriety.

5. Each Oxford House should be autonomous except in matters affecting other houses or Oxford House, Inc. - as a whole.

6. Each Oxford House should be financially self-supporting.

7. Oxford House should remain forever non-professional.

8. Propagation of the Oxford House, Inc. concept should always be conceived as public education.

9. Members who leave an Oxford House in good standing should become associate members.

Oxford House™

1975-2014

39 Years of Organized Self-Help To Enable Alcoholics and Drug Addicts to Recover Without Relapse

- Providing Sole Authority for Oxford House Charters
- Providing Technical Assistance to Establish New Oxford Houses
- Providing Technical Assistance to Keep Existing Oxford Houses on Track
- Providing Organization of Chapters to Help Houses Help Themselves
- Providing the Time, Living Environment and Support to Enable Alcoholics and Drug Addicts to Achieve Recovery Without Relapse
- Providing the Legal, Philosophical, and Scientific Framework for a Cost-effective, Worldwide Network of Supportive Recovery Housing.

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