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To: Conference Participants
From: World Board
Date: 23 January 2006
Re: Area Planning Tool

Attached you will find the Area Planning Tool. We are offering this as a tool to assist all service bodies in providing more focused and effective services. This is not meant to be seen as a guideline or a directive. Please take what you can use and adapt it to your local needs.

NA World Services has been engaged in a process of strategic planning for many years. This process has changed and evolved over that time, and we've learned quite a lot. Strategic planning has improved both our processes and the outcome of our work, and there is much that we would like to share with the fellowship, that we feel could help our service bodies at every level.

We originally set out to try to share this process by creating a tool for regions. But as we worked on it, we began to see that it makes more sense to focus this tool where most hands-on service is performed: at the area. We do, however, hope that this tool will also prove helpful for regions and zones. We encourage you to try this tool, or parts of it, and to share your experience with us.

You may want to begin by skimming through the whole area planning tool to get a sense of its contents. You will see that the document is divided into several parts. The main body is devoted to an explanation of the planning process. Following that explanation is an outline that covers the same material in brief, and then after that outline are a number of tools that may help in the process (a sample area inventory, questionnaires and worksheets, and so on). We expect that this document and the process it reflects will continue to be improved as it is used by the fellowship.

We hope that you find as we have that planning allows your service body to come together to work toward a common goal, to focus on what is truly most important in your efforts to carry the message, and to routinely identify what is working well for you and what is not. The outline and the tool that follow should help you in all of these efforts.

In NA, all parts of the service structure work towards a common goal; to more effectively carry the message.

Area Planning Tool

I. Purpose and Benefits of Planning

Why plan?

The one-sentence answer to that question is that planning helps us better carry the message to the addict who still suffers. The aim of an area service committee (ASC) is to coordinate services on behalf of the groups served by that area. In essence, an area is the way in which all groups join together in an effort to further NA's primary purpose—to make our message of recovery available and accessible to everyone in their community. Planning helps groups and area service committees determine where services are most needed and ensure that all area activity supports movement toward mutually agreed-upon goals.

When there is no planning, it's easy for us to function in a vacuum, making faulty assumptions based on incorrect or outdated information. Oftentimes a service body will move forward in a status quo fashion—“this is the way we have always done it” may be the theme song. And with this theme song, areas may find that their committees do not work together with each other, with the group service representatives (GSRs), and with the administrative body. The right hand doesn't know what the left hand is doing, so to speak.

Planning makes it easier for the members of an ASC—GSRs, area committee members, and the area administrative body—to work together. And because the heart of an ASC is the groups, the better we function as an area, the more our groups are able to fulfill their primary purpose.

This planning process is also beneficial for regions and zones. The focus here is on the area service committee, yet the planning steps can be applied to regional and zonal service settings. Whether the service body is an area, region, or zone, we encourage members to use the planning process.

Benefits of planning

“To fulfill our fellowship's primary purpose, the NA groups have joined together to create a structure which develops, coordinates, and maintains services on behalf of NA as a whole.”

First Concept

As addicts, we know how it feels when others make decisions for us. Many of us lived our lives by default in active addiction. Just as recovery allows us to become “acceptable, responsible, and productive” individuals, it also allows us to incorporate these qualities in our service efforts. Through planning, each member of the area service committee is better able to participate in responsible choice-making, and members' contributions are valued. Planning helps us to collectively invest in the livelihood of our area, which fosters a positive sense of pride in our service aims and efforts. Often, when we are performing service, it's easy to forget that our

responsibility is to the groups. Planning helps us focus and coordinate service activities on behalf of the groups. We join together with the knowledge that our service efforts will help ensure that no addict seeking recovery need die from the horrors of addiction.

II. Preparing to Plan

Who plans?

All trusted servants of an area service committee participate in planning; however, certain members need to be entrusted with the responsibility of setting the planning process into action. In many areas, this responsibility would fall to the administrative body of the area, with the area chairperson facilitating the process. Some areas may choose to create an ad hoc committee whose membership is composed of various trusted servants along with the administrative body.

For each responsibility assigned to the service structure, a single point of decision and accountability should be clearly defined.

Fifth Concept

Why the administrative body? Those trusted servants are elected at an area, rather than group, level and are accountable to the area as a whole. The area chairperson facilitates the discussion during the ASC meetings and, often together with other members of the administrative body, is responsible for setting the agenda of the area meeting.

Since the planning process takes several area meetings to complete, planning sessions need to be coordinated with an area service committee's immediate action items when setting the agenda. The chairperson is well positioned for that role as well as being elected as a facilitator who can function as the area's "single point of accountability" for the task of coordinating the planning process. Of course, there may be instances when an area may choose a different member to facilitate the process, but, for continuity and accountability, we suggest using the area chairperson to facilitate planning sessions.

Planning actions

Once an area service committee decides to proceed with planning for its services, adequate time should be allocated over a series of area meetings with a preset agenda. Trusted servants of the area, including the GSRs, should be given ample time to inform groups and members of the area about the planning process and its scheduled time frames. Providing an opportunity for everyone who desires to be involved in the process is an important aspect of planning. The process may benefit from the participation of experienced members who are not currently of service to the area and from new members.

There are seven planning actions: gathering information, listing the issues, setting goals, prioritizing, formulating approaches, reprioritizing, and developing an action

plan. Each step is necessary to the overall development and creation of the plan.

Preparation

There are things that need to be considered *before* members can actually sit down and plan to provide area services. A few simple, straightforward actions can help the planning sessions to be productive and fulfilling for all members involved.

- ◆ Meeting space — Is the size of the meeting room adequate? If the ASC is considering holding the planning sessions in the same facility as the business meeting, the area should consider whether the space is adequate for this purpose. Does the meeting room provide for the creation of small groups during brainstorming sessions? Is the meeting space easily accessible—in a central location for most members of the area?
- ◆ Communication — Is there enough time to give adequate notice of the upcoming planning meeting? Have the days, times, and locations of planning sessions been communicated to members of the area?
- ◆ Commitment — The seven action steps to this planning process may be taken over the course of two or possibly three area planning meetings. Ideally, an area service committee aims for two meetings. The area has created enthusiasm for the process, desires continuity with planning members, and wants to sustain this energy throughout the planning. Extending the sessions over a long period of time may be detrimental to the area's aims. By nature we are results-oriented, and we want to develop practical solutions in an effective, efficient manner.
- ◆ Planning materials — Each table will benefit from having paper and pens. As thoughts and ideas arise, we want to be able to capture them on paper. The facilitator needs large post-it pads and magic markers to record the information from the small groups so every member can read the suggestions from other members. Also, supplies need to be provided to help the planning group when the time comes to prioritize service aims (see step five below).
- ◆ Refreshments — Has the area committee discussed providing coffee, tea, water, or snacks for the planning sessions? In this discussion, we may want to consider the volunteer commitment and the importance of creating a welcoming, hospitable atmosphere. Sometimes service bodies do not realize that providing refreshments helps to promote unity and a sense of community.

Gathering information — step one

This action usually occurs over the two months preceding to the meeting where the issues are listed (step two).

This is usually accomplished through an area inventory. Collecting information with an inventory helps trusted servants recognize what services are working and where improvement is needed. The inventory also helps identify which services are absent or deficient. This information informs the area's planning decisions. An inventory

generally consists of three broad topics:

- ◆ How well has the area done this year in serving the groups, and how can it better serve them in the coming year?
- ◆ How well has the area committee served the larger community, and how can it improve?
- ◆ How well has the ASC supported and collaborated with NA's regional and world services? How can the area provide better support for these services?

These all-encompassing questions set the groundwork for discussion. Members may not have given a thought to how the area has been serving its groups. What do the groups want from the area, and what may be lacking? An area may find groups that do not regularly participate at the area meeting and decide these groups need to be a focus of the area's attention and support.

An inventory can help uncover some of the reasons for lack of participation in the service body. For example, an ASC may learn that its subcommittees do not coordinate and communicate with each other. An activities committee might have planned an event for the same day and time as a phoneline training and PI health fair booth. An area may initially think that it lacks trusted servants, yet may learn that coordination and planning for one function at a time helps trusted servant participation.

It's not just important that relationships within the ASC be strong, it also helps the work of carrying the message of NA to suffering addicts for the area to build valuable relationships in the community and project a positive image of NA as a reliable and credible program of recovery. An evaluation of these relationships and the image of both NA and the area service committee is an important part of gathering information. The area may discover, for example, that several meetings have lost their meeting space due to members' disruptive and disrespectful behavior. The area could then decide that enhancing the credibility of the NA program is a primary aim.

In addition, in reviewing the service committee's relationships with regional and world services, the area could recognize that they may benefit from the experience of regional trusted servants who could, for example, generate ideas to help improve services and strengthen subcommittees. The area inventory component is an invaluable tool to help ensure that the ties that bind us are strong.

There is a sample area inventory in the addenda to this document. An area could consider sending an inventory such as this one to the groups. Once the responses have been returned to the ASC and the information is compiled, the area is ready to proceed to step two.

III. Developing the Area Plan

Getting focused

Having gathered information from members and groups, the area is now ready to begin developing a plan in earnest. But before delving into the particulars of the area inventory, the ASC or the planning group should remind itself of the fundamental goals and sense of purpose they already share. Begin by reviewing the NAWS Vision Statement and the purpose for an area service committee. If the ASC has a purpose or mission statement, it is a good practice to review it as a group; if the ASC does not have a purpose statement, this may be a good opportunity to develop one.

NA World Services Vision Statement

All of the efforts of Narcotics Anonymous World Services are inspired by the primary purpose of the groups we serve. Upon this common ground we stand committed.

Our vision is that one day:

- ◆ Every addict in the world has the chance to experience our message in his or her own language and culture and find the opportunity for a new way of life;
- ◆ NA communities worldwide and NA world services work together in a spirit of unity and cooperation to carry our message of recovery;
- ◆ Narcotics Anonymous has universal recognition and respect as a viable program of recovery.

As our commonly held sense of the highest aspirations that set our course, our vision is our touchstone, our reference point, inspiring all that we do. Honesty, trust, and goodwill are the foundation of these ideals. In all our service efforts, we rely upon the guidance of a loving Higher Power.

Listing the issues —step two

This action occurs at the first meeting.

Through the area inventory process, the ASC has a wealth of information. As with our personal inventory, we do not shove the information in a drawer. Rather, the area begins the process of identifying issues to resolve and places to improve.

This may be best accomplished by using small groups with six to eight members in each group. In small groups, members can freely share ideas and brainstorm solutions. In a large group, members may not feel as free to express their ideas. Also, the process of identifying issues from the inventory can be lengthy. Creating an environment with a free idea exchange and review of the inventory material usually helps members to actively participate and share ideas. In addition to having a copy of the area inventory, each small group should be given paper and pens to write down

their issues. A time should be set, say sixty minutes, to review the inventory material and create a list of issues. Planning members are reminded of our spiritual principles during this process.

The area facilitator will then ask for one topic or issue from each small group and list these on a post-it sheet. The planning group may choose to identify topics under two broad categories, such as area service goals (services an area provided or wants to provide) and area operational goals (how an area functions to conduct business). If topics are listed in this way, the two broad categories may overlap. For example, one small group may identify lack of trusted servants, specifically groups lacking area representation because there is no GSR. Another group may identify lack of trusted servants to support area committees. The common thread is a lack of trusted servants, which affects both how an area delivers services and how an area service committee operates.

Setting goals (identify “what,” not “how”) – step three

This action happens at the first meeting.

After all small groups have shared the issues they have identified and these have been recorded, the planning group reviews all issues and starts to identify goals or, put simply, solutions for identified issues. Goals are clear, concise, results-oriented aims that are achievable. One such goal could be that all trusted servant positions be filled within groups and the area service committee. That is a statement with a concrete end in mind. In setting goals, members should not start discussing how to get there. The task is simply to identify area aims. Many of the identified goals will take a year to achieve, while some goals may span a two- or three-year period. The goals that take longer to achieve tend to add an element of continuity to the area plan and consistency to an area’s direction, even though trusted servants may change yearly.

Prioritizing – step four

This action happens at the first meeting.

After the issues have been reviewed and the goals are identified and written on separate post-it sheets, the members now step back and review their work in an attempt to determine what needs to be done first to improve area services. Even though the initial thought may be to do it all, members recognize that the ASC cannot realistically and responsibly accomplish all identified goals right away. The area needs to evaluate where the most urgent need is. A productive plan is challenging and exciting and moves area members toward action without overwhelming them.

- *Prioritizing methods*

There are different ways to select priorities. Each member attending the planning meeting can be given five dots and asked to select five priorities by placing each dot by a goal he or she sees as a top priority—with no repeats. Once every member of the planning body is finished, the facilitator totals the number of dots by each goal. It will be

evident what the group collectively views as their top five goals.

Another method uses magic markers. Each person participating makes a mark (check, star, dot, etc.) next to each goal that is considered a priority. Every member has a set number of goal choices. The area body decides which prioritizing method would work best for them. Using dots requires a little more preparation, but it does ensure that each member select a set number of priorities.

When all members, all participants in the process, have made their choices, the area chairperson will count and mark which issues have received the most choices. The issues with the highest number of marks become the priority issues for the area. During this planning meeting everyone in attendance participates equally; the actual adoption of the plan occurs during an area service committee meeting where decision-making occurs according to area policy or practice.

Formulate approaches (actions to reach goals) —step five

Ideally, this process occurs at the first meeting; however, the length of the previous sessions and possible “burnout” of members in attendance needs to be taken into consideration. This step may be moved to the second meeting; if so, then continuity of members in attendance ought to be highlighted.

What is an approach? Quite simply, an approach describes how to reach a specific goal—what steps an area has to undertake to achieve its previously identified and prioritized goals. The plan to reach a goal takes into consideration all current area efforts, the information that was gathered from the groups and area inventory sessions, and new ideas. In the interest of simplicity, members may want to limit the number of steps to achieve each goal to two or three.

In the process of formulating approaches, the group may recognize that the area already has some existing approaches for some of the identified goals. Areas often have steps to reach their goals, yet frequently haven’t discussed these during service meetings or through any area planning process. If a current strategy is working, then include that under existing approaches.

- *How to Accomplish*

An area planning meeting may choose to use small groups to develop approaches. This allows members to brainstorm and come together on their ideas for approaches to achieve goals. Each small group could be responsible for developing ways to reach one goal and report those approaches to all members present. New ideas that spring from other members in the planning meeting can be added to the list.

Alternatively, an area committee may choose to develop approaches outside of the regularly scheduled area meeting. Area subcommittees may be asked to create plans to meet goals, particularly if the identified goal pertains to an area committee. The administrative body of the area may develop action steps to reach area operational goals. At a subsequent area meeting, these goals and approaches can be discussed with the area committee.

Reprioritizing (a second look) – step six

This occurs at the second meeting. Ideally, all participants have had an opportunity to think about area goals and priorities and have taken the time to discuss them with the groups. During this review period, it is helpful to remember that the priorities have been confirmed by the planning group; in this step, goals may be rearranged.

The area now needs to consider prioritizing the approaches for each goal. Members review each goal and the identified steps, keeping human and financial area resources in mind. Are there enough willing members to achieve this approach? Will the area be able to continue providing existing services while adding this approach to achieve a stated goal? While considering the area's resources, members also think about whether this is the best approach to reach a goal and address whether this is a critical issue for area service provision.

This reprioritization process is deliberate and decisive. Members simply rank the developed approaches, clearly identifying their priorities using a number ordering system of 1, 2, and 3.

Even though this may be difficult—a numbering system means firm parameters—firm parameters can be very helpful. An area should remain focused on its goals and the actions to achieve these goals, rather than be thrown off course with “new ideas” that could come up during a year. Sometimes, unanticipated, seemingly urgent issues may surface during a year. For example, six months into the area plan, a GSR might make a motion to have an area convention. A plan gives an area a way to evaluate these issues or concerns more responsibly by reviewing them against the area's prioritized goals. A question to ask may be *Does this idea, opportunity, or request fit within the goals and priorities an area has identified for a year?* Answering this question helps an area service committee remain focused on its prioritized goals rather than be sidetracked by impulsiveness or passionate pleas.

Develop an action plan – step seven

This step usually occurs between the second meeting and third meeting, which is focused on plan implementation and monitoring. The action plan is developed by the area administrative body or area planning ad hoc committee in a meeting that occurs outside of the usual area meeting. These trusted servants set time aside between meetings to develop the action plan.

This is the step preceding implementation. An action plan is created for each approach. In this phase, the administrative body (or ad hoc committee) identifies: 1) tasks that need to be done, 2) time frames for accomplishing the tasks, 3) trusted servants who are responsible for completing the tasks, 4) resources that are needed, and 5) a completion date. The trusted servants on the ASC's administrative body are usually asked to complete this step because they, in particular the chairperson, represent the single point of accountability for the area service committee.

Effective leadership is highly valued in Narcotics Anonymous. Leadership qualities should be carefully considered when selecting trusted servants.

Fourth Concept

An action plan helps members remain focused on the goal, on the approach, and on the completion date; in short, it is easier for members to be accountable. Everyone involved knows what needs to be done, who is doing the work, and when to anticipate each step's completion.

Communicating progress at each area meeting helps in monitoring the process. Even though a plan covers the year ahead, we do not want each step to take a year. Also, communication helps with troubleshooting—an area may see obstacles and be able to resolve them through discussion as they arise. For example, resources, human or financial, may not be adequate to complete an action step. Providing the area body with this information and discussing solutions guides members to make the necessary adjustments.

IV. Plan Implementation and Monitoring

This happens at the third meeting, the regularly scheduled area service committee meeting.

With the planning process completed and the area's plans and goals approved, the area body is ready to put the plan into action. All of the written work—goals, approaches, and action plans—comes alive, ready to be realized.

Goals and plans are usually given to corresponding area committees for completion. For example, if a goal involves contacting community medical professionals, more than likely that goal and action plan would be forwarded to the public information committee. In areas where no specific subcommittee structure exists, the area committee may create workgroups to complete the task. Not every goal requires a permanent subcommittee. Each workgroup needs a clear purpose to help the area achieve its goals.

Once the goals and their accompanying action plans have been assigned to committees and workgroups, the members of these groups need to create work plans. A work plan will grow from an action plan with increased specificity and tangible numbers. Specifically, members within each committee accept responsibility for specific aspects of the action plan and the committee reports its progress to the ASC on a regular basis—at every scheduled area service meeting during subcommittee reports. Work plans also consider human and financial resources. Will it take a member sixteen hours to complete a task or sixty hours? How much money will it take, and when will money most likely be needed? These two resource areas are included in the progress report to the area. Maintaining this resource information will help an area plan better in the future.

Even though an action plan designates a completion date with approximate time frames for task accomplishment, a work plan more specifically reflects time frames. If thirty-day milestones have been projected in an action plan, a work plan may show forty-five days to reach identified points because the committee members have identified more details and challenges than previously considered when the action plan was developed. Accurate record keeping and reporting can help an area

improve its annual planning process. This information captures an accurate picture of the time and money that are involved in accomplishing any area goal, and helps set the stage for more realistic planning in subsequent planning cycles.

V. Planning Cycle

Each year an area committee should update its plan using the following steps:

- ◆ Review plan from last year and assess progress and remaining priorities
- ◆ Gather new information on members' needs, area's operational performance, etc.
- ◆ Review longer (two- to three-year) goals and establish new priorities and approaches for the upcoming year

Ideally, the decisions that an area committee makes during its planning process drive the focus of the work and use of area resources for the upcoming year. As a result, an area may consider setting its annual planning session as follows:

- ◆ as soon as the new ASC administrative body is elected
- ◆ prior to the development of the area budget
- ◆ prior to the development of goals from area subcommittees

Adaptations

Even though the number of meetings is outlined above, this is hardly set in stone. Each area will need to determine how many meetings it needs to accomplish the planning process. We identified steps based on the notion that an area meets monthly, and this planning would be in addition to the business meeting. For example, if an area usually meets for two hours, they may choose to add a couple of hours to each business meeting over a two- to three-month period. Other areas may choose to shorten their business meetings or to have the planning meeting separate from the area meeting and devote a full day to planning. Once the initial plan is created and approved by the area service committee, yearly updates should only take an hour or two.

Time frames are contingent upon the size of an area and the number of members involved in the planning. Of course, regions and zones may opt to meet over a weekend and target one full day for planning. This is fluid and flexible. Remember, as our Basic Text tells us, "If it's not practical, it's not spiritual."

Area Planning Outline

“All members of a service body bear substantial responsibility for that body’s decisions and should be allowed to fully participate in its decision-making processes.”

Seventh Concept

I. Purposes and benefits of planning

- ◆ improve efforts to fulfill NA vision in area service committee
- ◆ involve diverse member interests and perspectives
- ◆ build stronger consensus in an area
- ◆ provide clear priorities for use of an area’s resources
- ◆ achieve greater consistency in direction for an area over the short and long term
- ◆ improve accountability for attaining goals

II. Preparing to plan

- ◆ Who should be involved
 - GSRs
 - area administrative body
 - committee chairs
 - interested area members
- ◆ Logistics for planning session
 - identify specific time for planning sessions
 - identify facility to meet planning needs
 - create productive environment for planning sessions
- ◆ Information gathering – *step one* of the planning process.
 - types of information to be gathered:
 - ❖ the needs and challenges of members and local groups
 - ❖ the effectiveness of current area services, activities, and operations
 - ❖ the quality of relationships with the public including perceptions of NA and the local area service structure
 - tools to help gather information
 - ❖ sample area inventory tool that follows this outline
 - ❖ area planning tool A: sample group questionnaire
 - ❖ area planning tool B: sample questionnaire for evaluating issues in the community

III. Developing the area plan

- ◆ Review information gathered and issues to be addressed

- distribute information and planning session agenda prior to planning meeting
- review NAWS Vision Statement and purpose for an area service committee
- discuss information gathered and develop a categorized list of issues to be addressed – *step two* of the planning process
- ◆ Develop goals and priorities
 - define what makes a good goal (including the fact that goals can take more than a year to reach); provide examples
 - create goals for each key area (service and/or operational) – *step three* of the planning process
 - after discussing importance and method of prioritizing goals, set priorities – *step four* of the planning process
- ◆ Develop approaches and action plans
 - define what makes a good approach; provide examples
 - integrate current area services and activities with new ideas
 - develop approaches for each goal (begin with priority goals) – *step five* of the planning process
 - after discussing importance of approaches and need to prioritize these, set priorities – *step six* of the planning process
 - explain the need for and develop an action plan – *step seven* of the planning process

IV. Plan Implementation and Monitoring

- ◆ Implementing the plan
 - use the area subcommittees (or workgroups) to effectively implement the plan
 - develop committee tasks and work plans, keeping in mind ASC budget and human resources
- ◆ Monitoring the plan
 - Schedule committee reporting to ASC – how often and for what purpose
 - use area meetings to discuss progress and address issues
 - keep groups and members informed
 - develop ways to consider new area ideas once the plan is developed and adopted

V. Planning Cycle

- ◆ Annual review of adopted plan
 - assess progress with goals and plan
 - gather new information from members
 - review multiyear goals – update approaches
- ◆ Scheduling the planning session

- upon election of the new ASC body
- prior to the development of the area budget and subcommittee goals

Area Inventory

An area may want to send this inventory or a similar set of questions to the groups. Members or groups can answer each question with a number from one to five, using a scale such as:

1 2 3 4 5
Not at all Needs Improvement Adequate Outstanding Excellent

When the numbers are totaled, the area can see what most needs improvement (1) and what is going quite well already (5).

How well has the area served local groups this year?

- How well does the area communicate with local groups? _____
- How well does the area respond to the needs of local groups? _____
- How well is the area managing its donations and area treasury? _____
- How effectively does the area demonstrate responsibility and accountability? _____
- How fully does the area train and support members who serve on the area service committee? _____
- How well does the area service committee foster an atmosphere of courtesy and mutual respect? _____
- How completely does the area provide opportunities for communication about committee concerns to the local members and groups? _____
- How well is a sense of unity fostered within the area service body? _____
- How positively is a sense of unity shown within local groups? _____
- What is the area's experience with trusted servants? _____
- How well has the area fostered the willingness of the local fellowship to volunteer for service positions? _____
- How well does the area practice continuity and rotation? _____
- How well does the area function in maintaining a full complement of trusted servants, with no open commitments? _____
- How fully does the area create an environment where the conscience of the body guides the decisions and direction of the area? _____

How well has the area done this year in making NA's message more widely known in the larger community?

- How well is the area communicating with those in the community who interact with addicts? _____

- How completely does the area respond to the needs of the larger community? _____

- How well is the area using human and financial resources to carry NA's message of recovery in an efficient and effective way? _____
- How fully trained and supported are the trusted servants who interact with members of the community? _____
- How well has the area built cooperative relationships with those in the larger community? _____
- How easily can those in the larger community reach an NA member who is in a position to respond to their questions or requests? _____

How well has the area cooperated and collaborated with the region and NA World Services this year?

- How effectively does the area communicate with the region and with NA World Services? _____
- How well does the area respond to requests from the region and from NA World Services? How fully does the area share its needs and concerns with the region and NA World Services? _____
- How reliably does the area forward funds to the region and/or NA World Services? _

- How effectively does the area use resources (such as written materials or experience from other trusted servants) that are available through the region and/or NA World Services? _____
- How fully has the area formed a cooperative relationship with the region and NA World Services? _____
- How well is the area creating a sense of unity with the region and NA World Services?

Is there any particular area of service and/or area function that you perceive is outstanding? Please identify: _____

Is there any particular area of service and/or area function that you perceive would need improvement? Please identify: _____

Sample Planning Session Agenda

Focus on task (30 minutes)

- Review planning session purpose, format, and anticipated outcomes. Review NA Vision Statement, ASC purpose statement, traditions, and concepts.
- Briefly discuss the future of the area and the effect the area can have on the members, groups, and community at large.

Develop issues (75 minutes)

- Review, clarify, and discuss the information from the area inventory.
- Categorize information as “area service issues” or “area operational issues.”

Set goals (45 minutes)

- Set goals for each issue identified.
- Prioritize goals.

Develop strategy (75 minutes)

- For each goal, review and evaluate current area services and activities.
- Brainstorm new items.
- Create and write down approaches for each goal.
- Prioritize strategies under each goal.

Take next steps (45 minutes)

- Discuss what steps need to be taken to document information and approve the area plan.
- Identify next steps to: 1) prepare for plan implementation including determining subcommittees and workgroups needed, 2) assign goals to subcommittees and workgroups, and 3) develop work plans.

As the title of this page indicates, this is simply a *sample* agenda, and the times next to each step are approximate. The amount of time for each step will vary with the number of members involved in the planning process, the depth of the information gathered from the area inventory, and the number of issues that are identified.

As we mention earlier in this document, these tasks may need to be carried out over two area meetings, and in some instances the area planning sessions may need to be extended to three or four sessions.

Regardless, we suggest that breaks – opportunities for members to stand, use the bathroom, get something to drink, etc. – be built into the process. A twenty-minute break for every 90 to 120 minutes of work is a good guideline.

Area Planning Tool A

Sample Group Questionnaire

❶ *What are the top challenges your group faces in creating a strong atmosphere of recovery?*

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❷ *On a separate sheet of paper, list the services and activities provided by the area. Next, evaluate each service or activity by answering the following two questions: In what ways are these services valuable to your group? How could they be improved?*

❸ *What could the area do better to support local groups?*

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❹ *How could the area encourage more members to get involved at the area level?*

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❺ *Do you have any additional suggestion for what the ASC should consider during its planning session?*

Area Planning Tool B

Sample Questionnaire for Evaluating Issues in the Community

- ❶ *What are you seeing right now as some of the most pressing trends or issues in regard to addicts and addiction?*

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- ❷ *What sources of information do you think people are using to find out about recovery options? Do you think NA is typically included in these information sources?*

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- ❸ *How easy is it to find information about NA? How can we make it easier for people in the community to find out about NA?*

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- ❹ *How can we raise the public's awareness of NA?*

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- ❺ *What can we do to better communicate with those outside of NA?*

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Area Planning Tool C

Goal-Setting Worksheet

| Area Service Goals | | |
|---|--|-----------------|
| Issue | Goal | Priority Rating |
| Example: Build relationships with local correctional institutions | Provide information about NA (through informational contact, presentations, literature, etc.) to three local prisons, jails, detention centers | |
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| Area Operation Goals | | |
| Issue | Goal | Priority Rating |
| Example: Improve the way the area discusses and resolves issues | Implement small group discussions before voting and educate GSRs about the Twelve Traditions and Twelve Concepts through a short activity at the start of each meeting | |
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Area Planning Tool D

Goal and Steps to Reach Goal *(make additional copies of this worksheet as needed)*

GOAL: _____

| Existing Area Practices, Services, Activities Related to the Goal | Overall Priority Ranking |
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Area Planning Tool F

Goals Committed to Area Subcommittees/Workgroups

Work Plan Worksheet

| | Goal: | | |
|---------------------------------------|---------------------|---------------------|---------------------|
| | Plan to reach goal: | Plan to reach goal: | Plan to reach goal: |
| Subcommittee or other group needed | | | |
| Results needed from subcommittee work | | | |
| Important deadlines | | | |
| Resources available | | | |
| Coordination needed with others | | | |