

Service System Proposals Field Testing

In order to gather more information about the service system proposals and to help frame a transition plan, we are conducting field testing of the ideas outlined in the proposals. We sent out this field testing frame with three different introductions (the first two pages of the document):

- To all communities interested in field testing
- To potential “core” communities
- To regions in states, nations, and provinces that are talking about reunifying or collaborating with other regions to provide shared services.

All three of those introductory pages as well as the tools we are developing for the project and all other current material related to the service system are posted on the service system website: www.na.org/servicesystem.

A bit more information about the field test:

We’re calling this a “field test” and not a formal “beta test” because we are limited by the nature of the test and our time frame. Many communities are testing GSUs or LSUs or even both, but in all cases, we are testing pieces of a larger system out of context. We are also unable to conduct the field test for an entire conference cycle. We are beginning the field test in November 2012 and we need to begin drafting the *Conference Agenda Report* in less than a year. Unfortunately, given our limitations, it’s not possible to do more, but we expect we will learn much from this field test even if it isn’t entirely “scientific.”

We have a large number of service bodies field testing and adapting parts of the proposals in whatever way makes sense to their communities as well as a “core group” of diverse communities performing a more controlled field test. These core communities have agreed to form GSUs or LSUs that conform as closely as possible to the descriptions in the Service System Proposals. The community agreements included in this document were signed by the core communities. Because of the limitations of budget, time, and logistics, that core group of testers is limited to North America, and the number of communities is relatively small.

The general field test is, however, much broader and international in scope. We are interested in hearing about **any** community’s local implementation of the ideas in the proposals. If you are working on implementing some aspect of the proposals or just considering it, we want to help however we can. The more information we can gather from NA communities about how the service system ideas work in actual practice, the easier it will be for us to draft a transition plan and service tools.

Field testing tools:

We are putting together tools for the field test and those tools will be posted to the project page as they are developed. The tools are all labeled with month and year in the header because we hope to revise them as we receive input. They are works in progress. We welcome your input!

Anonymity of field testers

We have decided not to publish the list of communities who are field testing parts of the proposals or who have agreed to be core group testers because we want to give them the ability to make community decisions with as little interference as possible. We don't want to disrupt their process by opening them to the possibility of public scrutiny, criticism, and a potentially overwhelming amount of ideas from all over about how they should be operating their service bodies or group forums. This does not limit your ability to share this information if you choose to – NAWs will just not be publishing this information.

GSU Community Agreement

We would like to test GSUs in urban and rural communities. We'd also like to test both the linear and two-track GSU/LSU models, as well as the three different administrative set-ups listed below.

Outcomes

The proposed system includes both GSUs and an LSU rather than a single body, the ASC, with a dual focus. Our hope is that both service delivery and group support will improve when there is a service body devoted exclusively each function. We proposed the GSU because we hoped that a body devoted to group needs that was casual and welcoming would improve our groups' ability to carry the message and increase members' involvement and interest in service. With that in mind, the broad outcomes we're hoping to test are:

- Is the GSU helping to generate enthusiasm and involvement? (In the short time given for our field test we can't realistically measure cultural change, but we can get an initial sense of the GSU's effect.)
- What effects have the GSUs had on the groups?
- What effects have the GSUs had on the LSU or ASC?
- What are the benefits and challenges of the GSU?

It's important to note that field testing GSUs without an LSU or vice-versa may skew the results of the field test. We accept the fact that some core group testers may not implement both elements, but it can be helpful to keep in mind what the system as a whole might look like if in place.

Checklist of Standards

For the purpose of field testing, all GSUs should be consistent with the description in the Third Draft Service System Proposals (pages 57–59 of the proposals: www.na.org/servicesystem).

GSUs are

- Monthly gatherings of group delegates and interested members
- Focused on group issues, not business or decision making
- Informal, discussion-based
- Local enough to be like a neighborhood gathering
- Smaller than the proposed LSUs and, in most cases, than existing ASCs

Variations

Linear and Two-track Set Ups

Linear GSUs send a delegate to the LSU. For the purposes of the test, in communities testing only GSUs, not LSUs, linear GSUs would send a delegate to the ASC.

Two-track GSUs do not send a delegate to the LSU. However, groups belonging to a two-track GSU do send a delegate to the LSU.

We are interested in testing both set-ups.

Administrative

The service system proposals describe a number of different possibilities for administering GSUs. We would like to test each of these variations:

- Recovery groups take turns hosting the GSU.
- The LSU plays a part in administering or hosting the GSU
- There is some sort of administrative component within the GSU itself.

Time Frame

The time frame for our field test is roughly nine months: November 2012 – July 2013. During that time, GSUs should meet monthly and we will communicate with the testing communities after each meeting.

Support

Initially we plan to have facilitator guidelines and sample agendas for the GSUs. As the field test progresses we may develop more tools if needed. We will communicate with testing communities monthly at minimum

Communication

Testing communities should designate a primary point person as the main contact for the community and a point person for each GSU. Point people should send us all materials produced locally by and for the GSUs—guidelines, minutes, etc. We'll communicate monthly with point people to hear how the GSUs are working and to find out how we can better support the field test. Each month as we talk, we hope to get a sense of how the GSU is affecting your community and how we can improve our communication about the proposals. Are there points of confusion that could or should be clarified or fleshed out in the proposals relating to the GSUs?

Debriefing

At the close of the field test we'll have some sort of debriefing with field testers. That may involve bringing some field testers together for a joint meeting of GSU testers or it may simply consist of emails, calls, or virtual meetings with each community individually. We have not yet worked out these details.

In addition to the broad outcomes mentioned above, we will be interested in hearing the details of how the GSU worked in your community. Some of the questions we know we'll have include:

- Has communication increased or improved? Has it decreased or worsened?
- Does collaboration seem to be improving or worsening?
- How is the community handling fund-flow and literature distribution?
- What seem to be the advantages and disadvantages of the model your GSUs are using (linear or two-track model)?

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- What seem to be the advantages and disadvantages of the administrative model your GSU is using?
- Does monthly seem like the right meeting frequency for GSUs?
- How much do the GSUs cost to administer and where do those funds come from?

GSU Core Group Field Testing Agreement

As a GSU core tester, we agree to conduct a test between November 2012 and July 2013 including the following:

- Hold monthly GSU meetings consistent with the description of a GSU in the Third Draft Service System Proposals and the “checklist of standards” above.
- Appoint a point person who will function as the primary contact
- Communicate regularly with world services.
- Share any material that we develop as part of the test (e.g. minutes, reports, agendas, etc.)
- Use the tools and materials provided to us by NAWS.
- Participate in a debriefing session at the end of the test.

Point person signature: _____ **Date:** _____

Printed name and preferred contact information:

As the NAWS test support team, we agree to support a test between November 2012 and July 2013 including the following: .

- Communicate regularly with the testing community.
- Provide tools to assist the GSUs
- Share tools developed by and experiences of other core testers
- Coordinate a debriefing session at the end of the test.

NAW contact signature: _____ **Date:** _____

Printed name: _____

Please send the signed agreement to
Service System Field Test
NA World Services
19737 Nordhoff Place
Chatsworth, CA 91311

We will sign it and send a copy back to you.

LSU Community Agreement

We would like to test LSUs in urban and rural communities, and we'd like to test the linear and two-track GSU/LSU models. We are also interested in communities that might be willing to field test both the GSUs and LSU.

Outcomes

The proposed system includes both GSUs and an LSU rather than a single body, the ASC, with a dual focus. Our hope is that both service delivery and group support will improve when there is a service body devoted exclusively to each function.

We proposed the LSU because a body grounded in planning should allow groups and interested members to make more strategic and holistic decisions about service delivery. With day-to-day administrative work delegated to a local service board (LSB), group members can focus on setting goals, overseeing the work, and evaluating the results.

With that in mind, the broad outcomes we're hoping to test are:

- Has the LSU improved the quality of group, or group delegate involvement with local services?
- Do local services seem better coordinated and more collaborative?
- What are the benefits and challenges of the LSU?

It's important to note that field testing an LSU without GSUs or vice-versa may skew the results of the field test. We accept the fact that some core group testers may not implement both elements, but it can be helpful to keep in mind what the system as a whole might look like if in place.

Checklist of Standards

For the purpose of field testing, all LSUs should be consistent with the description in the Third Draft Service System Proposals (pages 61–63 of the proposals: www.na.org/servicesystem).

LSUs must have the following components:

- LSUs are comprised of two main parts: quarterly planning sessions and monthly service board meetings.
- LSUs are driven by a strategic plan, and administer services through a combination of project plans and committees or coordinators for ongoing work such as phonelines.
- The local service board is responsible for day-to-day administration of services. The LSB includes a chair, vice chair, treasurer, secretary, delegate(s) to the state body (for the field test, these would be delegates to the region), subcommittee chairs, and service or project coordinators.
- The LSB oversees workgroups and routine services; coordinates the planning assemblies; develops budget and strategic plan to be reviewed, input, and approved by the planning conference; and sends a delegate to the next level of service

- The quarterly planning sessions include all LSB members plus group or GSU delegates. (In the two-track model, groups send a delegate to the LSU. In the linear model, GSUs send a delegate to the LSU. We are interested in testing both set ups.) These sessions focus on giving input toward and approving a strategic plan, and overseeing and evaluating the work of the plan throughout the year.
- Once a year, there is a planning session devoted to an environmental scan. GSUs and groups send a delegate to this session and an extra effort is made to encourage all interested members to participate.
- LSUs utilize consensus-based decision making.
- The LSU sends a delegate or delegate team to the state/nation/province body (or, for the purposes of this field test, to the region).

Note: The proposals describe an LSU that conforms to geographic boundaries such as city boundaries or county lines. For this test, we don't expect LSU boundaries to be collaboratively determined with neighboring LSUs at the state level. We simply anticipate that some existing ASCs will reform themselves into LSUs; so it's worth noting that the field- testing LSUs may be smaller than the bodies the proposals imagine and their boundaries may be different.

Some ASCs may wish to field test the LSU but still maintain their regular ASC meetings "alongside" the new LSU meetings. We recognize that some communities may want to do this, though it's important to understand that this is a somewhat artificial environment in which to test an LSU.

Time Frame

The time frame for our field test is roughly nine months: November 2012 – July 2013.

During that time, local service units will meet quarterly, so there should be time for three of the four planning cycle meetings, beginning with the environmental scan meeting. We encourage communities to take on at least one short term project (six months or less) during the testing period so that the LSU can see a project all the way through during the field test time frame.

Local Service Boards will meet monthly, and we will communicate with testing communities after each LSB meeting.

We anticipate the LSB will need to meet first a couple of times to plan and administer the environmental scan meeting, which would be scheduled for some time in December or January.

Support

Initially we plan to have tools that bridge the gap between *Planning Basics* and the Service System Proposals that show how ideas in *Planning Basics* would work for the LSU and LSB. We'll develop facilitator guidelines, including ideas about how to facilitate an environmental scan/planning assembly; sample planning assembly agendas; sample LSB task lists; and tools to help create project plans and/or workgroup charges.

We may not have all of these items completed by the 1 November field test starting date, but we hope to have them all drafted by the time communities are holding their environmental scan meetings.

We also know some members want more materials on how to practice CBDM on a local level. We will attempt to put together some basics for the field test, and we also believe the field test will help us further develop these types of tools.

We will communicate with testing communities monthly at minimum.

Communication

Each LSU should designate a point person who will be the main contact for the community. That person should send us all materials produced locally by and for the LSU and LSB—guidelines, minutes, strategic plan, project plans, etc. We'll have monthly contact with that person to hear how the LSUs are working and to find out how we can better support the field test. Each month as we talk, we hope to get a sense of how the LSU is affecting your community and how we can improve our communication about the proposals. Are there points of confusion that could or should be clarified or fleshed out in the proposals relating to the LSUs?

Debriefing

At the close of the field test we'll have some sort of debriefing with field testers. That may involve bringing some field testers together for a joint meeting of LSU testers or it may simply consist of emails, calls, or virtual meetings with each community individually. We have not yet worked out these details.

In addition to the broad outcomes mentioned above, we will be interested in hearing the details of how the LSU worked in your community. Some of the questions we know we'll have include:

- What are the particular benefits and/or challenges of the planning process? Of project-based service delivery?
- Is the relationship between the Local Service Board and LSU at large (the planning assemblies) working well? Is communication effective? What additional tools could we develop to help?
- How is it working to delegate administrative details to the LSB? Has that process been smooth and effective?
- Has communication increased or improved? Has it decreased or worsened?
- Does collaboration seem to be improving or worsening?
- How is CBDM working in the LSU? What additional tools could we provide to help?
- Does monthly seem like the right meeting frequency for LSBs? Is quarterly the right meeting frequency for planning sessions?
- How much do the LSUs and LSBs cost to administer and where do those funds come from?
- How is the community handling fund-flow and literature distribution?

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- Are the LSU and its processes affecting group involvement and satisfaction? (In the short time given for our field test we can't realistically measure cultural change, but we can get an initial sense of the LSU's effect.)

LSU Core Group Field Testing Agreement

As an LSU core tester, we agree to conduct a test between November 2012 and July 2013 including the following:

- Hold quarterly LSU meetings and monthly LSB meetings consistent with the descriptions of LSUs and LSBs in the Third Draft Service System Proposals and the “checklist of standards” above.
- Appoint a point person who will function as the primary contact
- Communicate regularly with world services.
- Share any material that we develop as part of the test (e.g. minutes, reports, agendas, etc.)
- Use the tools and materials provided to us by NAWs.
- Participate in a debriefing session at the end of the test.

Point person signature: _____ **Date:** _____

Printed name and preferred contact information:

As the NAWs test support team, we agree to support a test between November 2012 and July 2013 including the following: .

- Communicate regularly with the testing community.
- Provide tools to assist the LSUs and LSB
- Share tools developed by and experiences of other core testers
- Coordinate a debriefing session at the end of the test.

NAW contact signature: _____ **Date:** _____

Printed name: _____

Please send the signed agreement to
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NA World Services
19737 Nordhoff Place
Chatsworth, CA 91311

We will sign it and send a copy back to you.

State/Nation/Province

Our information gathering about state/nation/province bodies will not be a formal field test along the lines of the LSU and GSU tests. Because we have so little time for this field test, it doesn't seem realistic to expect to field test the transition from a multi-regional state to a single-service-body state. What's more, one of the primary functions of the state/nation/province body is to coordinate local service bodies in a system of service, so unless a state was willing to test LSUs throughout, we would not be able to perform an accurate field test.

Nonetheless, we know of several states that are talking about sharing services and some states are considering what it might look like to reunify. We hope to join in some of those conversations and learn as much as we can about the implications for the project. The World Board is still trying to resolve some outstanding questions about seating and service delivery in large and small states and countries, and these ongoing local discussions should help in that effort.

The pages that follow are a more casual explanation of state/nation/province, shared services, and intermediate bodies and how we might gather more information from local communities.

The state/nation/province briefly described (for more information see pages 67–68 of the Third Draft Proposals: www.na.org/servicesystem)

The state/nation/province service body has several main functions. It helps to coordinate efforts among its member LSUs; it provides state-, nation-, or provincewide services such as public relations; and it serves as a communication link between world and local services. And so a state/nation/province service body would help LSUs coordinate event and planning calendars. It might roll out tools and/or training for things like facilitation or mentoring and help put on local workshops. Establishing and maintaining relationships with state, nation, or province wide organizations or government branches would happen at this body. And this body would be responsible for sending a delegation team to the World Service Conference as well as the zonal forum. As with the local service unit, decisions are made via consensus.

Reunification of Regions

As we said, it would be great to test an actual transition from a multi-regional state to a single-service-body state, but we can only do so if we know of regions willing to try reunifying. We know there are a few states that are having conversations about what that possibility might look like in the future, and we hope to be able to somehow join those conversations and use that information regardless of the outcome. Our role would depend on the regions involved, what they are trying to accomplish, and what help they feel they need.

We may also want to initiate conversations with regions within some large states (even if they have not discussed regional reunification) to ask what they think reunification would entail and how we could best support the process. In the case of large states, such as California, we could have a useful conversation about how to handle service delivery in such places. For example, if one service body statewide seems impractical, how many might work and how could they best coordinate efforts?

Shared services

What we are calling “shared services” is the joint effort of more than one service body to provide services such as public relations and hospitals and institutions. We know some people have misunderstood the intermediate body described in the Service System Proposals as some kind of shared services body, perhaps like a “metro” as described by *A Guide to Local Services in NA*. Shared services differs structurally, however. In a shared services situation, service bodies combine efforts to provide a particular service or set of services, but they each still send a delegate to the next level of service and they each have the same level of authority or decision making ability. Questions of accountability can be challenging when there are multiple service bodies involved and there is not a “single point of accountability.” For that reason, we have not included a metro or other kind of shared services situation in the Service System Proposals.

Even though shared services is not part of the Service System Proposals, we are including it as part of the information we hope to gather in this process because we have heard of so many regions investigating ways to collaborate statewide to provide services such as PR and H&I. Having a number of regions within the same state attempting to collaborate on service delivery may yield information that could be useful to the project. Further, some regions that are talking about collaborating on service delivery see such an effort as a step toward possible regional reunification. As with the regions who are discussing possible reunification, we hope to stay in close contact with these communities.

Some questions we hope to answer about shared services

- How is accountability working for the service bodies that are collaborating on service delivery? How, for instance, do they resolve conflicts when they do not have an overarching service body to which they all report?
- How are these joint services funded?
- Has this collaboration sparked ideas for regions about the prospect of reunifying into a statewide body? How might a statewide body help or hinder service delivery?
- Do these efforts shed any light on how to handle service delivery in very large state/nation/provinces?

Tools for State/Nation/Province Bodies

As we mention in the section on LSUs, we know members have been asking for more materials on how to practice CBDM. We are not sure how much we can produce during this field-testing period, and we also know there is a need for more tools devoted to communication, mentorship, and training. When possible, we hope to develop some basic reporting tools, perhaps a checklist of what needs to be communicated on a regular basis between service bodies.

Intermediate Body

Brief Description

(for more information see pages 64–65 of the Third Draft Proposals: www.na.org/servicesystem)

This is one of the least understood parts of the Service System Proposals. Intermediate bodies are intended primarily to function as a “connector” service body between the LSU and the state/nation/province. Intermediate bodies are formed in places where they are needed because of distance, density, or language. Many places will have no need for intermediate bodies, but in some places large distances will make travel to the state/nation/province body difficult. In such cases, an intermediate body may serve as a sort of “way station” where LSUs can send a delegate, and elect one delegate to attend the state/nation/province from the intermediate body.

In other places, high density may mean there is such a large number of delegates at a service body that having one or two delegates from an intermediate body may make service delivery easier than having a delegate from each LSU.

The other factor that may lead a community to form an intermediate body is language. If there are a number of meetings conducted in a language other than the primary language of the community, those groups may want to form an intermediate body and send a delegate or delegates to the LSU or state/nation/province.

Because intermediate bodies are proposed as a way to close gaps, it is difficult to imagine how to test them apart from the other components in the system. Their function is so tied into the system as a whole that we would have to field test them in concert with state-nation-, or provincewide bodies and their member LSUs. In the time allotted that doesn't seem possible.

In conclusion

Know that none of this is laid in stone and we will be finding our way together as this field test unfolds. These are just our ideas now. We are truly paving the road as we are driving on it. . . .