

PLANNING BASICS

A GUIDE TO STRATEGIC THINKING, PREPARING, AND REACHING OUR GOALS

2011





Often, in our efforts to carry the message of recovery and provide effective services, NA communities face challenges. These recurring issues come up time and time again at service meetings. Planning may offer the long-sought solution to common problems.

ISSUE: There is a communication breakdown between service bodies. Trusted servants do not know what to report and how to organize all the information to be communicated. There is no communication loop where information is passed along from world, zone, region, area, to the groups, and then back again.

ISSUE: There is a lack of financial resources for identified local services. Contributions are not being forwarded from the groups, and trusted servants are relying on the yearly convention contribution to cover expenses. No one asks, “What happens if the convention loses money?”

NA funds are to be used to further our primary purpose, and must be managed responsibly.

Twelve Concepts for NA Service

PLANNING HELPS CARRY THE MESSAGE

to the addict who still suffers. NA was there for us when we had a desire to stop using drugs. When we plan, we ensure that our message of hope will be available, in the future, to any addict who desires recovery from active addiction.

WHY PLAN?

Quite simply, planning makes our services more effective; it helps us work toward a common goal. *A Vision for NA Service* reminds us that we strive to work together in the spirit of unity and cooperation to support the groups in carrying the message of recovery.

We share a common purpose: to better carry the message of recovery. Planning for NA services asks us to think ahead, take time to prepare, and develop action plans to reach identified goals. Opportunities for planning begin with the identification of issues that affect our ability to provide consistently effective services.

MORE EFFECTIVE SERVICE THROUGH PLANNING

The ability to communicate effectively is highly valued in NA service. Communication breakdowns can affect our ability to carry the message of recovery in a number of ways. Through planning, we can find solutions to improve our services.

For example, the meeting directory is updated periodically. If the group representative does not understand how to pass along meeting information or make the necessary adjustments to a website, group meeting locations and times may be out of date. The result is that newcomers can't find meetings, the local treatment center doesn't know where to take their clients, and we have failed to carry the message.

There are a number of possible solutions. It may be a good idea to create a form for the group representatives to use when submitting meeting updates. This can be done online, if an email address is provided, or through a service body. If this form is distributed to groups regularly, the printing deadline for the schedule is communicated, and the groups are given plenty of time to respond, then meeting information can be kept current. It can be included in each printing of the new meeting directory and accurately reflected on the website. Planning helps to identify a problem like this—inaccurate meeting directories—and take action to solve it.

This sounds like a big order, but planning can be broken down into manageable pieces. It won't be accomplished all at once. Like our personal recovery, progress—not perfection—matters!

SCANNING

A look at our services and a look into our community

Planning usually starts with gathering information about the needs of the local NA community, service body, and the larger community (town, city, county). We call this scanning. We carefully consider the routine services that are already being provided by local committees. Our goal with scanning is to identify the strengths and weaknesses of our existing services, and to discover new opportunities for service delivery. This requires us to look at how our service bodies function and how NA can respond to the needs of the larger community. We collect valuable information from the perspective of the members, groups, and service bodies, as well as from professionals and agencies in the community.

LOOKING AT OUR SERVICES...

We consider how members and groups perceive services and how our committees are providing services. This can be done using various approaches. We can use an inventory tool such as the service inventory, group inventory, or the questions from *The Group Booklet*. Some service bodies may have developed their own inventory tool. When an inventory resource tool is used, a workgroup needs to collate the responses and have that information available for members to read prior

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to the planning assembly. Or, in some service bodies, a brainstorming session or open forum at a service meeting may be an alternative to a planning assembly.

We scan, collecting input from all of our members and trusted servants. This input is used as the starting point for planning. We begin to evaluate the effectiveness of our services by simply listening to and acknowledging the perceptions of members and trusted servants.

During this evaluation, we especially consider the essential existing services such as H&I, PI/PR, and phonedines. We will want to take into account the budget of each committee and look at exactly how the money is allocated. It is important to examine how much we are spending on services like NA literature for H&I panels, posters and bus benches for public information, automated meeting directories for the NA phonedine, and prudent reserve/start-up monies for activities including conventions. During scanning, we have the opportunity to identify services that are outdated or no longer working and to begin the process of finding solutions.

Since we are collecting a broad range of input from various perspectives, we listen rather than debate the value of ideas or engage in championing one service area over another. We remain open-minded to everybody's ideas about the strengths and weakness of the service body and its committees, trusted servant resources, and finances. We also consider places where we may be lacking, or where a need in the community is not being met.

WHO PLANS?

Any member who wants to have more effective service efforts can plan. Planning can be done by groups, areas, regions, zones, committees, and world services.

All members can participate in this process. Trusted servants and other members are encouraged to work together. This can include an administrative body, a workgroup, experienced members, regional delegates, or any combination of trusted servants.

At first, planning means we gather ideas and topics about services. It is important that we evaluate all the routine services provided by local committees like hospitals and institutions, public information/public relations, phonedines, and activities. We ask ourselves: Are these committees still providing relevant services, or simply doing what they have always done? We do not limit ourselves; we consider new ideas and existing areas of service that may need improvement. All viewpoints are taken into consideration. Our goal is a free-flowing exchange of thoughts—and we can have fun! Service that is fun is attractive, and members become enthusiastic in an enjoyable planning atmosphere.

We begin by assigning a person or small group to coordinate planning efforts. This is a necessary piece of the planning process. We can all participate, but effective planning requires the efforts of a team leader or small workgroup.

MORE EFFECTIVE SERVICE THROUGH PLANNING

All our service efforts should be motivated by the desire to better carry our message to the still-suffering addict, but this requires money. A lack of financial resources within the service body interferes with its ability to purchase literature and deliver services.

For example, group contributions are down and the service body is relying on the convention to generate funds. Due to the lack of effective planning by the service body, the H&I committee has no literature to take into the institutions at this time.

As part of the planning process, the service body considers how much money is needed yearly for literature. With a goal in mind, a budget can be created. This allows the body to identify how much each group needs to contribute monthly in order to make this a reality, and then they can inform each group of the need. This is a planning action which helps to make certain that our literature continues to reach those seeking recovery who cannot attend a meeting, as well as professionals who interact with addicts.

HOW DO WE PLAN?

Decide that planning is a priority. We can foresee the rewards and possible benefits of more effective services in an area, region, or zone.

Choose a workgroup or coordinator. Hold a discussion in the service body to determine whether a single coordinator or workgroup may be best for planning. Willingness, service experience, and the ability to follow through are valuable qualities for a trusted servant who is going to take on this responsibility.

Gather ideas, topics, issues, and perceptions. This is often referred to as “scanning.” Scanning is the process of looking within, to examine the effectiveness of the services we provide; and looking outside NA, to the larger community, to see where we may be needed. With many members involved in gathering and generating input, we gain a broader perspective.

Collect all ideas and topics gathered, and then brainstorm to clarify issues and identify anything that was missed. This helps us to make sure we didn’t overlook an idea or issue, and confirms that we all understand the identified areas.

Prioritize issues. We cannot do everything we want to do all at once. Deciding what is most needed to provide better services is how we prioritize. Some items will typically emerge as high priorities. We examine all issues and decide their order of importance in better carrying the message of recovery.



Develop goals to address the prioritized issues. Decide how we are going to resolve the issues.

Consider available resources. A solution or goal can only be effective if the resources (human and financial) needed to accomplish it exist.

Choose who is going to address and develop action plans. Very simply, an action plan is the collection of steps needed to reach the goal. This plan can be developed by a workgroup, committee, or service body. For example, if the goal is focused toward building effective communication, it makes sense for the members who work on this plan to be experienced with reporting service information.

Monitor and evaluate your efforts. The group or committee that is developing and implementing the action plan is accountable to the larger service body. The larger service body is responsible for monitoring goals and deciding how often reports are needed. Quarterly reporting may help to maintain focus on the plan, and offers the opportunity for solution-based action. It is important to monitor and evaluate the plan to achieve the desired results.

WHEN WE PLAN,

we are able to grow and change to meet the needs of our fellowship. If we want to continue to reach addicts with our message, we need to be flexible and willing to move forward on a path of planning.

LOOKING AT OUR COMMUNITY...

We also want to understand how our larger community sees NA in order to help us reach addicts who we can provide with an opportunity for recovery. This type of scanning can be done a number of ways. Perhaps we see that a professional healthcare conference will be in our town. We can use this event as an opportunity to have a discussion about their perceptions of NA. We may also want to solicit information from social service agencies, treatment centers, drug courts, even the police department to see how NA can be a resource for addicts in the community. We want to work together with other organizations in ways that are helpful for both. Once all the issues have been identified, it is time to get together to talk about solutions.

LET'S GET STARTED!

- Set a planning calendar that will work best for your service body. Use common sense to work around yearly events such as conventions, holidays, and committee meetings. Eventually, as planning becomes routine, a planning cycle may emerge and dates can be worked into an annual, or biennial, service calendar.
- Decide where and when to have the planning meetings. Consider whether to include planning as part of a service meeting. We may find that members attend committee and service body meetings with a specific focus, so planning may be done as its own event. However, in some NA communities, planning is routinely done in conjunction with another service meeting or event.
- In addition to where to have planning meetings, members need to think about how many are needed. It may be a good idea to break up meetings, holding four 2-hour meetings rather than one 8-hour meeting. It's important to remind ourselves that we do not achieve results overnight; planning is a process.
- Choose a meeting place that is comfortable and easy to find; one that can be accessed by public transportation. Once a meeting place has been identified, choose three possible meeting dates. Announce the dates and see which one receives the most support from members. This can help achieve the best possible outcome with member attendance. Choose the date that appears to have the most support and reserve the meeting place.
- GSRs, RCMs, and other trusted servants need to have plenty of time (30 to 90 days) to inform members about the meeting times and dates. Make sure the planning meeting is posted on the local NA websites and in local NA newsletters, and announced at other service meetings.
- Planning meetings may be more productive with refreshments. Members like to eat, and we may not remember to bring a snack or lunch to a service meeting. Refreshments don't need to be costly or elaborate, but offering snacks does tell the members in attendance that their participation is valued. In addition to food and drink, supplying pens and paper for members will support the process.

PLANNING STEPS

Planning can be done in manageable pieces. It won't be done all at once. These steps are designed to be accomplished over the course of several meetings.

FIRST MEETING

SCANNING: GATHER INFORMATION

In some NA communities, this initial meeting may be called a planning assembly. We begin with scanning, which is necessary for effective planning and to help reach common goals. How we gather information will depend on what makes sense for our NA community. Some will have one meeting in a central location; others will plan several meetings at various locations in order to reach more members. The goal of scanning is to get input from as many members and trusted servants as possible. This will identify what services are working and where improvement is needed. In scanning, we collect information about how NA is communicating internally, how we're doing at providing services, and how we are functioning in the larger community.

During our evaluation of current NA services, it may be helpful to include an explanation of the roles of subcommittees such as H&I, PI/PR, and phonelines. We may also want to explain the function and responsibilities of the administrative body of the area service committee. Explaining our terminology and clearly defining the roles and responsibilities of each service committee will help all members feel included. This may even result in increased interest in service.

We welcome and encourage members to participate in the scanning process! When issues surface as a result of scanning, we will want to pay attention. Take the ideas gathered, share thoughts to clarify, and group related ideas together. Brainstorm for anything that was missed. Write everything down! Because we are collecting ideas from as many members as possible during scanning, it is important to create an initial priority list which identifies service areas valued by a broad range of members.



Scanning can be done at any level of service from world services to local service bodies and zones. The idea is simply to get a pulse from the fellowship and the community. We do this in a forum that invites all members to participate. This will help to get a broad perspective of services needed, rather than focusing on the desires of individual subcommittees or the most vocal members. We gather information to see where there are needs that NA can fill.

INVENTORY CURRENT SERVICES

We have all been in a service meeting where we heard the phrase, “but that’s how we’ve always done it!” Service members have various tools to help them identify what is working and where our current services need improvement. These include a brainstorming session, an open forum discussion, or an inventory tool such as a service inventory or one that has been developed by the service body. If an inventory tool is utilized, we need to collate the responses and have a completed report available for members. Through these processes, we can come up with new solutions or borrow best practices from what is currently working well, finding ways to apply them in places that are weaker.

INVENTORY CHALLENGES AND WHERE NA MAY BE NEEDED IN THE LARGER COMMUNITY

This may mean evaluating where the calls are coming from on the helpline. We may also consider professionals we have not reached in emergency rooms, 24-hour clinics, or social service agencies. It is also important to find out if there are places in the community where NA needs to mend its reputation. We may hear that a facility is disgruntled because an H&I panel didn’t keep a commitment or notify personnel. There may be requests for follow-up PI presentations that have gone unanswered. We need to know!

Once the scanning process is completed, the members who participated will make an initial prioritized list which will be forwarded to the service body. Members will identify which services they consider most important to take action on first. As we choose items, we remember our common goal with service delivery—carrying the message of recovery. The facilitator for this meeting will help members in the prioritization process.



SECOND MEETING

By the time we arrive at the second meeting, scheduling conflicts should be resolved as we enter into the planning cycle. The involved members and trusted servants of the service body are likely to be committed at this stage.

“While it is important to set goals and prioritize, it may be easier to drill down in a small group.”

PRIORITIZE ISSUES TO BE ADDRESSED

The service body evaluates the list that was initially prioritized by the scanning group to make sure the list is complete. We remain open to change, but we should also take into account the things that are working. We will want to consider whether anything is missing from the list. We look at existing gaps, consider current budgets, and take the opportunity to consider much-needed service improvements. We then decide which projects seem most necessary to do first, second, and so on. We can think about which projects may be easy to accomplish with current resources that will add value for service delivery, and we may also identify a more involved project. These both could be prioritized. As we prioritize, we keep in mind our common goal of providing effective services to carry the message of recovery.

DEVELOP GOALS

At this stage, we take the ideas and solutions gathered during brainstorming and turn them into goals. It is important to focus on what needs to be done, not how it will get done; that comes later! Begin by looking over the list of priorities and keep in mind the human and financial resources available.

EXAMPLES OF GOALS:

- Improve communication between service bodies, committees, and groups
- Increase contributions from groups to fund services

More goals may be identified than can be reasonably addressed in the near future. It is not necessary to prioritize goals; don't limit yourself. However, at this point, you have to decide how much you can take on with your human and financial resources. This may limit how many goals get worked on immediately and what goals need to be worked on at a later date.

IDENTIFY AVAILABLE RESOURCES

It is important to know how much money the service body has budgeted for its services. We review the budgets for each committee to see how the money is allocated. By doing this, we get in the habit of regularly evaluating the most efficient use of our resources. For example, we will consider how much literature we have been providing to facilities through the H&I committee and decide if the current amount is too much, too little, or adequate. Trusted servants may need to know whether it is realistic to ask groups to increase contributions for services. This will help them decide what can be accomplished. It is also important to consider human resources.

Members with time clean and service experience, who may or may not be currently involved, are often well-suited for these efforts. These members can be valuable resources;

we may even be able to identify a goal and action plan to attract experienced members to service. For example, have we considered when there is a lack of trusted servants willing to do H&I service that guidelines may be a contributing factor? We could ask, "Why do members with many years of experience need to attend monthly H&I committee meetings? Does attendance at the committee meeting make them more qualified to carry a panel?" In an effort to attract experienced members back to service, we may need to rethink accepted committee guidelines, i.e., the way we have always done a particular service. Planning may show that flexibility is needed to draw experienced members back to service.

THIRD MEETING CREATE ACTION PLANS

At this point in the planning process, we decide who is best suited to carry out the goals. Action plans are rarely created by a service body; usually this work is more suited for committees, workgroups, or ad hoc committees. It may be helpful to divide and assign the goals. Goals specific to H&I, PI/PR, and phonline, may be handed over to their respective committee. Likewise, goals specific to an administrative body may be assigned to them or a workgroup. Involving members familiar with the service can help to identify the necessary steps to take to achieve the goals.

Each group working on goals will return to the service body with their outline for:

- What tasks need to be done
- When these tasks need to be accomplished
- Who the trusted servants responsible will be
- Identification of a responsible accountable point person to track progress
- How much time and money will be involved



THE FEEDBACK LOOP

Considering all input is vital to the planning process. We want to understand what is working and what is not, so we can adjust. Monitoring the progress of our plans helps ensure that they are accomplishing the intended goals. When we keep accurate records and maintain accountability through reporting, we contribute to the long-term planning process. We want to keep track of the time and money that are involved in accomplishing any goal. This helps create realistic plans in the future.



In addition, we will want to consider how long these actions may take and how often the responsible members will report back to the larger service body. That larger service body is responsible for monitoring goals and deciding how often reports are needed. The body may decide if a plan spans a year; it may be a good idea to report back quarterly or twice a year.

An action plan is how we implement the identified approaches and accomplish goals. If there are parts of a current plan that are working, include “what is working” in the action plan. For example, the area website posts meeting changes. This may be a resource to help keep treatment centers and drug courts informed. We can work to improve the communication from the service body to help websites remain accurate.

Approaches are developed and ranked by the group or service body responsible for their implementation.

Goal: Improve communications between service bodies, committees, and groups.

Assigned to: Administrative Body.

EXAMPLES OF APPROACHES:

- To establish better communication practices, develop a worksheet for trusted servants to fill out at committee meetings in order to capture important information.
- Hold regularly-scheduled trusted servant communication training meetings (learning how to be an active listener at service meetings, taking notes, asking questions, and writing/giving reports).

Goal: Increased contributions from groups to fund services.

Assigned to: Administrative Body.

EXAMPLES OF APPROACHES:

- To raise awareness of the necessity of group contributions, conduct a workshop about fund-flow in NA. The pamphlets *Money Matters: Self-Support in NA* and *Funding NA Services* could be discussed.
- Identify how much money is needed yearly for services (H&I, PI/PR, phonelines, etc). Figure out what each group needs to contribute to make this a reality. Inform each group of the need, and ask for their help.

SAMPLE ACTION PLAN I

As developed by assigned group or service body:

Issue: Communication breakdown between service bodies can be due to uninformed or untrained trusted servants.

Prioritized Goal: Regularly scheduled communication training for trusted servants.

Approach: Plan a 45-minute communication training for all trusted servants.

Action Steps:

- Schedule communication training to happen before regular service committee meetings in the same location, if possible.
- Ask a member of the administrative body to facilitate and invite some experienced service members to participate in the training.
- Report to respective service bodies about the communication training.
- After the first three sessions, survey participants in an effort to evaluate results.
- Use the input to decide how to continue, and develop a list of best practices for service committees and common solutions.

Financial Impact: (We project how much money we need to accomplish goal.)

THE CONSCIENCE OF A GROUP

takes shape and is revealed when its members take the time to talk with each other about their personal needs, the needs of that group, and the needs of NA as a whole.

It Works: How & Why

SAMPLE ACTION PLAN 2

As developed by assigned group or service body:

Issue: A lack of financial resources within the service body interferes with its ability to purchase literature for service delivery.

Prioritized Goal: Increase contributions for service literature and plan yearly for the contribution amount needed monthly from the groups.

Approach: Inform groups of a need for contributions to meet a yearly literature budget for all committees.

Action Steps:

- Decide how much money is needed yearly for service literature.
- Identify how much each group needs to contribute to make this a reality.
- Inform each group of the need for contributions and ask for their help.
- Continue an ongoing monitoring of the contributions and make necessary adjustments.

Financial Impact: (We project how much money we need to accomplish goal.)

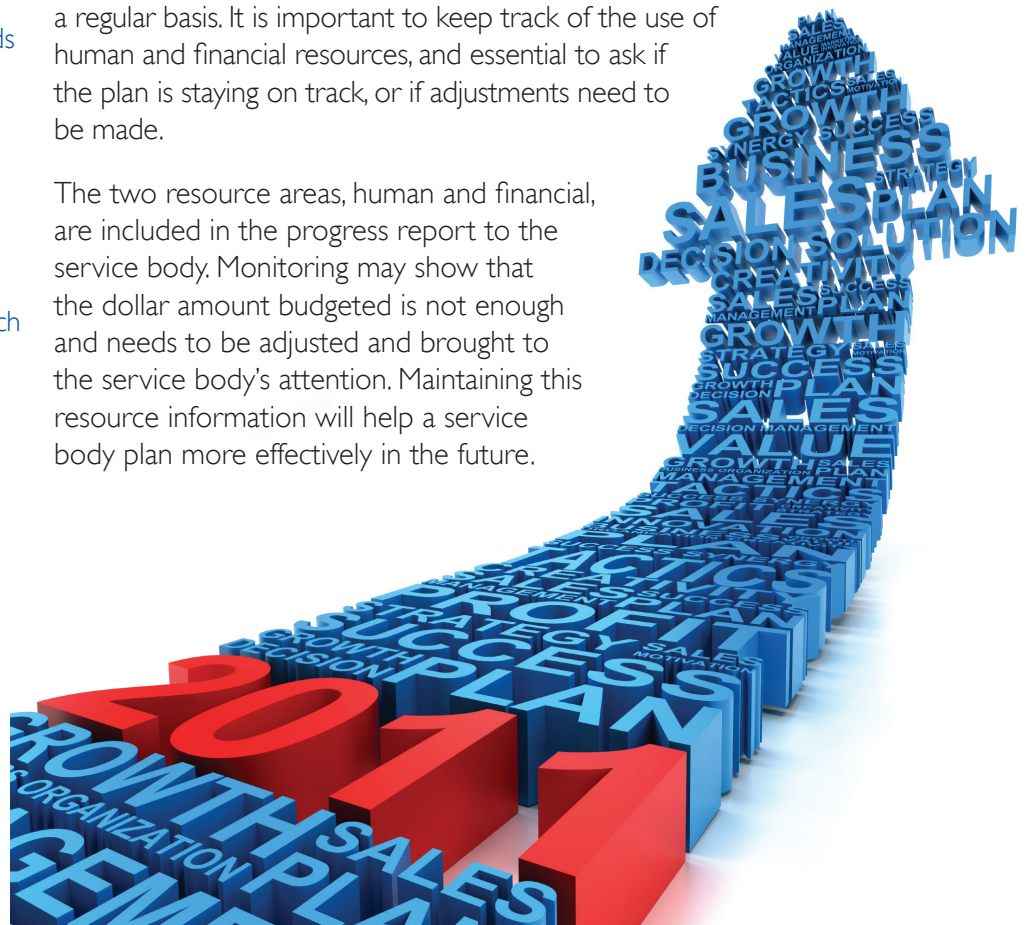
FOURTH MEETING MONITORING AND EVALUATION

A vital piece of the planning process comes when plans are put into action. This is very exciting because the ideas, results of scanning, priorities, goals, and approaches come alive!

Members who are responsible for carrying out action plans assigned by the service body are also responsible for monitoring the plans and reporting back to the service body as directed. Goals and corresponding action plans may be given to committees or workgroups for completion. For example, if a goal involves having H&I panels serve all institutions in the area, the H&I committee would typically be assigned the responsibility to create an action plan. Once an action plan has been developed by the assigned group, the service body affirms the identified steps prior to initiating actions.

Members who are responsible for carrying out the action plan as assigned, report progress to the larger service body on a regular basis. It is important to keep track of the use of human and financial resources, and essential to ask if the plan is staying on track, or if adjustments need to be made.

The two resource areas, human and financial, are included in the progress report to the service body. Monitoring may show that the dollar amount budgeted is not enough and needs to be adjusted and brought to the service body's attention. Maintaining this resource information will help a service body plan more effectively in the future.



Български

Eesti

Nederlands

मराठी

தமிழ்

Bahasa Melayu
Malti
Suomi

বাংলা

Türkçe

Latviešu

Slovenčina

Moldoveneasca

English

नेपाली

Українській
Bosanski

Íslenska

中文

A Vision for NA Service

All of the efforts of Narcotics Anonymous are inspired by the primary purpose of our groups. 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;
- Every member, inspired by the gift of recovery, experiences spiritual growth and fulfillment through service;
- NA service bodies worldwide work together in a spirit of unity and cooperation to support the groups in carrying our message of recovery;
- Narcotics Anonymous has universal recognition and respect as a viable program of recovery.

Honesty, trust, and goodwill are the foundation of our service efforts, all of which rely upon the guidance of a loving Higher Power.

עברית

Lietuviškai
Dansk
Slovak

Français

Portugueses
عربي
日本語
ಕನ್ನಡ

Afrikaans

Anglicized

हिन्दी

hrvatski

Svenska
Polski
فارسی

ਪੰਜਾਬੀ

Norsk

Русский

Magyar

Filipino

Deutsch

Brasileiro

Ελληνικά

Español

اردو

Italiano

মনপুরা

Bahasa Indonesia

ภาษาไทย

Swahili

PLANNING STEPS—FACILITATOR OUTLINE

FIRST MEETING

GATHER INFORMATION BY SCANNING

Invite all members to participate—current trusted servants and committee members, members who may no longer be involved in service and newer members. Encourage all to take part.

A. Inventory Current Services

- Process: brainstorm, use an inventory tool, have open forum discussion
- Review and explain services provided by committees including administrative body
- Identify what is working with services and where our current services need improvement

B. Inventory Challenges and Where NA may be needed in community

- Areas to review: Calls coming into helpline, responses from posters and billboards, number of presentations requested, etc.
- Challenge areas: Look at how NA's reputation is and public image concerns. For example, have we lost meeting facilities due to behavior? Are facilities disgruntled because we didn't follow through, etc?
- Overlooked areas: How are our services toward the police/parole departments, social service agencies, emergency rooms, etc?

C. Initial Prioritization: With scanning completed, make an initial prioritized list which will be forwarded to the service body. Identify which services to take action on first, keeping our common goal in mind.

SECOND MEETING

FINAL PRIORITIZATION AND ESTABLISHING GOALS

Service body trusted servants and members participate. Final prioritization and review of items from scanning meeting; develop goals

A. Prioritize Issues

- Review list with open mind and determine whether anything is missing, identify existing gaps, and consider current budgets.
- Prioritize projects that seem most necessary to do first, second, etc.
- Consider projects that are easy to accomplish with current resources and that add value to service delivery; these could be prioritized and paired with a more involved project.

B. Develop Goals

- Focus on what needs to be done, not how it will get done.
- Bring together list of priorities with current human and financial resources.
- Examples of Goals: Improve communication between service bodies and increase contributions from groups to fund services.
- Inventory Available Resources:
 - Review service budget including money allocated to committees for services.
 - Assess member resources, i.e., identify currently involved members and those who are no longer involved.

OUR VISION IS THAT ONE DAY:

NA service bodies worldwide work together in a spirit of unity and cooperation to support the groups in carrying our message of recovery...



THIRD MEETING CREATE ACTION PLANS

This is usually suited for committees, workgroups, or ad hoc committees.

- A. Assign goals to specific committees such as H&I, PI/PR, phonline, activities, administrative body. Involved members familiar with service to identify necessary steps to achieve goals.
- B. Committees/workgroups return to service body with proposal for goal completion; to include:
 - What tasks need to be done
 - Tasks completion date
 - Who the responsible trusted servants will be, with an identified point person
 - Time and money involved noted
- C. Approaches: developed and ranked by the group or service body that is responsible for implementation. Examples:
 - Hold regularly-scheduled trusted servant communication training meetings (learning how to be an active listener at service meetings, taking notes, asking questions, and writing/giving reports)
- D. To raise awareness of the necessity of group contributions, conduct a workshop about fund-flow in NA. The pamphlets *Money Matters: Self-Support in NA* and *Funding NA Services* could be discussed
 - Service body: determines frequency of reporting from committee/workgroup and evaluates progress toward goals

FOURTH MEETING MONITORING AND EVALUATION

- A. Members/committees, that are assigned action plans by service body, report progress on regular basis (determined by service body).
- B. Track human and financial resources being used; are we staying within the budget?
- C. Ask: Is the plan staying on track or do adjustments need to be made?
- D. Maintain accurate records; helps long-term planning process
- E. Feedback loop: routinely adjust, if necessary, based on input
- F. Sample Action Plan:
 - Issue: Communication breakdown between service bodies can be due to uninformed or untrained trusted servants.
 - Prioritized Goal: Regularly scheduled communication training for trusted servants
 - Approach: Plan a 45-minute communication training for all trusted servants
 - Action Steps:
 - Schedule communication training to happen before regular service committee meetings in the same location, if possible
 - Ask a member of the administrative body to facilitate and invite some experienced service members to participate in the training
 - Report about the communication training
 - After the first three sessions, survey participants in an effort to evaluate results
 - Use the input to decide how to continue and develop a list of best practices for service committees and common solutions

SERVICE INVENTORY

A service body may want to consider sending this inventory to the groups, trusted servants, and experienced members. Everyone contributes to the planning process when they answer these questions. Using a five-point scale assists a service body to see where improvement is needed and where there is outstanding service provision.

A scale can simply be:

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

Members provide a number next to each question. The numbers are totaled and the service body will see where the largest need for improvement (2) is noted and be able to see where services are excellent (5).

How well has the service body done this year with providing services?

- _____ The service body communicates information effectively and regularly between service bodies and the groups.
- _____ The service body responds to the needs of those they serve.
- _____ The service body has sufficient funds to meet the service needs.
- _____ Trusted servants of the service body have mentoring and training; they feel valued and supported.
- _____ The service body focuses on unity and effectively carries the message of recovery through its services.
- _____ Trusted servant positions are filled with qualified members by matching talent to task.
- _____ Trusted servant leaders have a term of service which includes mentoring a trusted servant for leadership.
- _____ Open trusted servant positions within the service body are filled within 60 days with a qualified member.
- _____ The service body uses consensus-based decision making.

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

- _____ The trusted servants of the service body have regular interactions with professionals in the community who interact with addicts.
- _____ The service body is timely in its response to the needs to the larger community.
- _____ The service body has the human and financial resources to carry NA's message of recovery in an efficient and effective way.
- _____ The trusted servants who interact with members of the community are regularly trained.
- _____ The service body has established helpful, mutual relationships with those in the larger community.
- _____ Professionals and agencies in the larger community can easily reach an NA member who is in a position to respond to their questions or requests.

Is there any particular service and/or function that you perceive is outstanding within the service body?
Please identify:

Is there any one service and/or function within the service body that you perceive needs improvement?
Please identify:

Is there any service that is being provided that is no longer needed or can be combined with another service?

Is there any service that is not being provided that is needed?

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ISBN 9781557768704 • 4/11
WSO Catalog Item No. 2116