**Zonal Self-assessment Workshop Approval Draft**

**Some Notes on Holding this Workshop**

Facilitation materials: Large pad and easel at front of room, markers, dots, PPT

On tables: Small group notes sheets, large post-it sheets, A Vision for NA Service, pens, markers

This workshop requires careful planning and skilled facilitation. It is designed as a two-hour session, but the timing may vary as each zone is encouraged to adapt it to their own unique, culture, style, and schedule. A two-person cofacilitation team is recommended, as is dedicating planning time before the session. There are several facilitation adaptations, so suggestions and options are offered throughout in text boxes. The workshop outline is presented in a script-like format, but each facilitation team should adapt it in a way that is most comfortable to them.

Before beginning the session, divide the room by counting off A and B, and have As move to one side of the room/set of tables and Bs to the other. If there are virtual participants, identify them as A or B. Organize participants so there is an equal number of As and Bs. The intent is to randomly assign participants to one of two small-group discussions before the workshop begins.

This workshop was developed by the WSC of the Future Project, and is forwarded from the World Board to zonal forums that want to use it. The WSC of the Future Project has three main goals, two of which relate to the role of zones and zonal collaboration:

* Role of Zones: Forward ideas to the Board for a project plan, as described in the motion passed at WSC 2018: *That the WB develop a project plan, including budget and timeline, for presentation at WSC 2020 on the role of Zones, their relationship to the wider fellowship, including integrating Zonal Delegate participation into the decision making process at WSC.*
* Zonal collaboration: Work toward two Fellowship Development approaches from the NAWS Strategic Plan:
  + Strengthen collaboration among zonal forums and between NAWS and zonal forums
  + Collect and share best practices of zonal forums.

This workshop was developed in this spirit, with hope that it will be a tool for zones to reflect on their origins, successes, strengths, and weaknesses; consider and establish goals; explore other zones’ activities and identify possible areas of collaboration; support their evolution; and help zones to clarify their role in the service system.

The first part of the session covers history and evolution of zones and a focus on each zone’s own history and development. The PowerPoint includes photos from all zones, but each zone can customize with their own photos and information on blank slides provided. The first part of the workshop couples with the second section, which explores a basic planning process. For zones that don’t use strategic planning, this is a brief introduction, which might inspire new or improved services and possible ideas for collaboration with other zones and/or NA World Services. For zones already doing strategic planning, this section could identify or add to new or previously unstudied areas of service and/or might contribute to their established planning processes. Even zones considering ways to streamline or decrease the services they provide may find this workshop useful.

**Zonal Forum Self-Assessment Workshop**

Before beginning the session, divide the room by counting off A and B, and have As move to one side of the room/set of tables and Bs to the other. If there are virtual participants, identify them as A or B. Organize participants so there is an equal number of As and Bs. The intent is to randomly assign participants to one of two small-group discussions before the workshop begins.

**Introduction/Set-up 10 mins**

**SLIDE: Workshop Title**

*Cofacilitators welcome everyone, introduce themselves, and explain workshop purpose.*

The 2018 WSC approved the WSC of the Future Project to strengthen collaboration among zonal forums and between NAWS and zonal forums, and to collect and share best practices of zonal forums. This workshop was developed by the WSC of the Future Workgroup as a part of that project.

The intent of the workshop is to help zones by reflecting on their origins, strengths, needs, and aspirations; to inspire connections and unity within zones and with other zones, and to initiate or contribute to a planning process. Overall, the hope is that the workshop is a tool that will help zones and their member regions to better carry the NA message.

**How zones developed (5 mins)**

**SLIDE: 1992 motion text (image of TWGSS/motion)**

As NA grew, the Fellowship and its service needs changed significantly in the late 1980s and early 1990s. In response to these changes, some regions came together to create what we now know as zones, but it wasn’t until a 1992 WSC motion that zones were formally recognized by the existing world service structure.

**[on slide]**

“The World Service Conference affirms that zonal forums, as service-oriented sharing sessions that provide means by which NA communities can communicate, cooperate, and grow with one another, are valuable components of NA. We support the continued work of the zonal forums that exist today worldwide and encourage any further efforts NA communities may take to support one another.”

The WSC recognized the existence and value of zonal forums in this statement, but it didn’t imply or give zonal forums any formal or official role or place within the NA service structure for years.

**Zonal evolution (5 mins)**

**SLIDES: Inspirational photos of zonal activities – early years (1 slide), middle years (2 slides)**

Over time, however, zonal forums and their roles have continued to evolve.

**SLIDE: GWSNA Text**

The current version of *A Guide to World Services* includes several references to zones:

* *Zonal forums are service-oriented sharing and/or business sessions that provide the means by which NA communities can communicate, cooperate, and grow with one another.*
* *World Services and zonal forums interact in many ways.*
* *World Services typically attends zonal forum meetings, and may provide funding for some participants’ attendance at zonal forums.*
* *Maintaining effective communication between the zonal forums and World Services is a high priority.*
* *World Services and zones should develop a partnership for the planning and conducting of workshops, and by assisting each other in the coordination of a variety of service efforts such as professional events and fellowship development activities.*

**SLIDE: Zonal photos (recent years)**

And in recent years, zonal forums have continued to change and evolve.

**SLIDE: NA Service Structure diagrams**

At WSC 2018, Conference participants passed a number of motions related to zonal delegates. As a result, zones that include two or more communities or regions that are not seated at the WSC may send a zonal delegate (ZD) and alternate to the Conference. The ZD is a funded, voting participant.

**SLIDE: Zonal map and National, multi-national, intra-national zones diagrams**

Today, zones have evolved in many ways. In addition to zones whose primary focus is the sharing of information between regions, some zones also provide a variety of services including Fellowship development and public relations, and some engage in strategic planning processes.

Some zones serve regions within a nation (like the Brazil and Canadian Zones), some are multi-national (like the European Delegates Meeting, Asia Pacific Forum, and Latin American Zonal Forum), and other zones are intra-national, serving a group of regions within a country.

**Large group questions/Discussion 45 mins**

**(10 mins per question, 5 mins prioritizing, 10 mins for goals)**

**SLIDE: Our zone’s development–zonal logo/map**

As a way to look at our own zone and its development, we’re going to briefly discuss our history, current practices, and our aspirations—and we’ll use this discussion as a way to lead us into a brief planning process.

*Facilitator captures responses by listing them on large sheet at the front of the room.*

There are three facilitation options for this section. The preferred method is the first one because it engages longer-term member(s) and helps to better manage the time:

A. Facilitator “interviews” experienced member(s) familiar with the zone’s history and development by asking the questions below. (The member should be identified and briefed well in advance so they are aware of the questions and time limitations). If this method is used, after the experienced member has shared their thoughts, facilitator can ask the rest of the group if they believe anything should be added to the list. This step is particularly important for question 3 because the active, current members will be most familiar with this info.

B. Facilitator poses the questions to the participants. In the interest of time, it may be best to limit up to five responses to each question.

C. Facilitator presents this information prepared in advance on a large sheet of paper, handout on tables, and/or PowerPoint slide(s).

**SLIDE: Questions 1, 2, and 3**

1. **What specific needs were identified when the zone was first formed, and are they still being met? If so, in what ways?**
2. **What other needs have developed since then that the zone is currently meeting/serving?**
3. **What other needs are present in our zone today that are not being met/served?**

*If necessary, facilitator could list some examples, such as a zonal-wide helpline, or better communication and work between zonal meetings.*

*Facilitator captures responses by listing them on large sheet at the front of the room.*

**Prioritizing (5 mins)**

*Provide each participant with two dots to identify what they believe are the top two needs currently not being met. Depending on the size of the group and room, and on time available, the prioritization process will identify one or two needs that will be discussed in small groups.*

Alternatively, if a zone wants to consider providing fewer services or wants to prioritize services currently being provided to better allocate resources, participants could prioritize a combined list of responses to questions 2 and 3, and then frame their small group discussions to focus on how to best adjust their service delivery.

**Goals (10 mins)**

As a group, let’s think of goals we can set to meet these two needs.

**SLIDE: Goal example**

Here’s an **example**:

The need or issue is the PROBLEM we want to solve

Need/issue: Lack of communication in between zonal forum meetings.

The goal is WHAT we want to accomplish to address the problem.

Goal: The zonal forum has a means of regular communication in between its regular meetings.

Later, we’ll discuss HOW to accomplish the goal, but for now, we just want to focus on WHAT we want to do to meet the need, so let’s brainstorm some goals that will help meet these needs.

*Facilitators lead brainstorming of goals for each of the two prioritized needs/issues, writing a list at front of room. Have the group prioritize one goal for each need/issue and then prioritize two goals to discuss in small groups.*

**Small group discussion 30 mins**

**SLIDE: A Vision for NA Service**

Before you begin your small group work, please keep in mind that A Vision for NA Service is what we strive for in all of the services we provide. We can look to the vision statement and see that each of the goals we have identified today can help us work toward that vision. In our small groups, we’re going to work on the beginnings of a plan to meet the goals we prioritized.

Remember that our zone has had many successes, and we can also be inspired by the ideas and work of other zones, so keep your minds open and think imaginatively in your discussions. For example, in 2017, the APF established a Women’s Fellowship Development Workgroup to encourage and support FD efforts within the APF and to raise awareness of and for women in recovery. They developed a Women’s Space on their website to provide information and direct contact with other women in recovery, held a women’s lunch at the APF convention, and they are developing a welcome packet that includes general NA info and articles and stories about women in recovery.

Another inspiring example is from the Western States Zonal Forum holding its first-ever zonal forum meeting in Alaska in January 2018. This was a key FD trip for the zone to collaborate with the local Golden Heart Area, the Alaska Region, and World Services. They did a PR presentation that included a tribal chief and Nenana residents who wanted to get NA started in their area. The presentation was also a model for the local PR subcommittee. They also held an open NA meeting to demonstrate how NA works. As a result, NA was started in Nenana—and is still going—with committed members in Fairbanks supporting its development. (In winter the roads are tougher, but two or three attend all the time).

**SLIDE: Small group process, roles, and questions**

**Small group intro** **& set-up (5 mins)**

Let’s take a few minutes to get things set up for the small groups, and then we’ll explain your task further.

* For the small-group discussion process—choose a facilitator, recorder, and reporter, note the ground rules, etc. Important note: Recorders must write clearly and provide enough information so that the notes are understandable when passed to the next group.
* For our small group process, the A group will cover one goal and the B group will address the other one. You’ll brainstorm ways to achieve one goal for ten minutes and then you’ll switch notes sheets with another group so they can add to your ideas and you can add to theirs.

**SLIDE: Small Group Questions**

So, we already prioritized two goals--WHAT we want to do to meet the unmet needs. Now in small groups you will brainstorm approaches, which are HOW to achieve the goal. You will brainstorm several approaches, and then prioritize one approach (question #1).

After that, you’ll identify what resources are needed to accomplish that approach and identify which resources are available (question #2) and which resources are needed (question #3).

Need/Issue \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (WHAT we want to accomplish)

**Approaches** (HOW we can accomplish the goal)

1. What is one way that we can reach this goal? (In other words, what is one way we could accomplish this?)

**Resources** (WHAT we need to accomplish the goal)

2. What resources do we have available to accomplish this goal (all resources we need: skills/experience of members, regions, zones, NAWS; information; money, etc.)?

3. What resources do we not have that we need to accomplish this goal?

**SLIDE: Small Group Discussion Example**

Let’s look at our example again as a reminder to see what we’ve done so far in the process, and where you’re going in your small group discussions. We’ve already identified the need or problem and we developed a goal. Now, it’s time to come up with ways to achieve the goal and what resources we need to take those steps.

*Facilitator reviews the steps taken so far in developing an action plan, using the example:*

Example

Need: Lack of communication in between our zonal forum meetings

Goal: The zonal forum has a means of regular communication in between its regular meetings.

1. Approaches: What is one way we can reach this goal?

* Use an online discussion board
* Use an online project management program that includes discussion/messaging capabilities
* **Hold regular web meetings in between face-to-face meetings – Prioritize an approach**
* Develop a monthly newsletter that’s emailed to all participants with updates on all projects and ongoing discussions

1. Resources available:
   1. Member regions with experience using web meeting platform
   2. NAWS hosts web meetings & could advise on products, best practices
   3. Other zones that meet virtually
   4. Internet research/product comparisons
2. Resources needed:
   1. Info about web meeting services available, meeting capacity and features, costs, etc.
   2. Money to pay for a web meeting service
   3. Only one experienced member at zonal forum, so need someone to help get started
   4. WiFi access for all participating zonal forum members

Any questions? If not, please begin your discussions!

**SLIDE: Small Group Discussion and Reporting**

*Facilitators circulate amongst tables to offer any guidance needed/requested. After 10 minutes, notify the A groups to switch their sheets with the B groups.*

**Small Group Follow-up and Wrap-up 30 mins**

**Small groups report back (15 mins)**

*Ask reporters to share each group’s approaches and identified resources available/needed to accomplish the goal.*

*Lead the large group in a simple polling process (or use dots again) to prioritize one goal as the first on which to move forward.*

**SLIDE: Next Steps**

**Next Steps: Action Plan (15 mins)**

Zones that already do strategic planning may want to forward the results of these discussions to the environmental scan process of their zone rather than beginning to draw up an action plan in the large group discussion that follows.

There are three facilitation options for this section, depending on the zone’s preference, practices, time available, etc.:  
A. Complete this part of the process discussion now

B. Work on it as a full group via email and/or in upcoming meetings

C. Assign the task of developing an action plan to a set of participants, subcommittee, workgroup, or strategic planning team.

To work toward meeting the goals we discussed today, the next step is to develop an action plan to accomplish the goal, which will include:

1. Identify point person/body accountable for the work.
2. Determine next steps and a rough timeline (when work will begin, estimated completion date, and or expected completed product).
   1. This might include a time by which the point person/body will advise the zonal forum of today’s results, timeline, and approaches seem realistic or if they recommend any adaptations.
3. Agree on how the zone will track and evaluate the work (when and how work will be reported back to the zone, how to check progress and success—according to timeline, by related results, or other measurable indicators).

**SLIDE: Thank You and additional notes**

**Wrap-up 5 mins**

This workshop offers just a small taste of a strategic planning process. We did a mini-environmental scan to identify needs, then we set some goals and brainstormed some approaches, and we discussed next steps to put our work into action. These and additional planning steps are outlined in a tool posted on the Local Resources webpage at [www.na.org](http://www.na.org), which can be adapted by service bodies to fit their planning needs.

There are three facilitation/language options, depending on the zone’s practices:

A. Because we don’t currently engage in strategic planning, it was a brief introduction to that process that hopefully inspired new or improved services and possible ideas for collaboration with other zones and/or with World Services.

B. Our zone already does strategic planning, but this workshop helped us scan our history and current activities, and helped us identify or add new perspective to our established planning processes.

C. As a zone, this workshop provided a framework for us to consider ways to streamline or decrease the services we provide can adapt this workshop.

Thank you all for a great workshop and the good work done by everyone. Was this session helpful? If you have ideas for improving the process, please share with us after the meeting.

***Cofacilitators, your small group discussion notes and action plan ideas can be helpful to the World Board in its strategic planning process. Please share your workshop outcomes with us. We would also like to know how you adapted the workshop to better fit your zone and its specific needs or if you have suggestions to improve the workshop. Email:*** [***worldboard@na.org***](mailto:worldboard@na.org)***.***