

consistent

effective

carry

the

message



technology

support

willingness



reliable

worldwide

contribute

commitment

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building

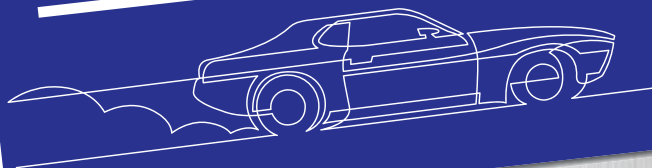
consensus

collaborative

Invest
in Our
Vision

Conference Agenda Report

26 April–2 May





World Service Conference Mission Statement

The World Service Conference brings all elements of NA World Services together to further the common welfare of NA. The WSC's mission is to unify NA worldwide by providing an event at which:

- Participants propose and gain fellowship consensus on initiatives that further the Vision for NA Service;
- The fellowship, through an exchange of experience, strength, and hope, collectively expresses itself on matters affecting Narcotics Anonymous as a whole;
- NA groups have a mechanism to guide and direct the activities of NA World Services;
- Participants ensure that the various elements of NA World Services are ultimately responsible to the groups they serve;
- Participants are inspired with the joy of selfless service, and the knowledge that our efforts make a difference.



Because the groups have created the service structure, they have final authority over all its affairs. By the same token, the groups also have the final responsibility for the support of all its activities. The two go hand in hand.

Twelve Concepts for NA Service, "Second Concept"

Conference Agenda Report

WSC 2020

26 April – 2 May

Woodland Hills, California

2020 Conference Agenda Report
World Service Conference of Narcotics Anonymous

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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.

Invest in Our Vision

Hello from Your World Board

The last two Conference themes came from A Vision for NA Service, so it's appropriate that this year's theme is Invest in Our Vision. It can be easy to see our vision as a horizon we may never reach, but when we invest our time, energy, and resources, we make concrete progress. More people hear the message of NA. More professionals who deal with addicts become willing to refer their clients to the program. And more of us experience a depth of spiritual growth and fulfillment that we have only found in service.

Most of us feel some level of ownership and responsibility for services provided on NA's behalf. Contributing our time and money to NA gives us an opportunity to manifest that feeling in a concrete way and strengthens our spiritual connection to the service system and the program.

IP #24 *Money Matters: Self-Support in NA*

If you look up the word *invest* in the dictionary, you'll find a number of different meanings. To invest in something is to put resources toward it with the expectation of a return—a future benefit. If you're reading this *Conference Agenda Report (CAR)*, you're a member who invests in NA. It costs nothing to belong to NA, but most of us are grateful to contribute our time, energy, and money to our meetings and services. We don't *have* to, but we *get* to. We benefit from that investment, and the broader NA community does as well. Our personal investments in Narcotics Anonymous help save the lives of addicts we may never meet.

There is also an emotional sense to the word *invest*; we become invested in our Fellowship in the sense that we come to care passionately for NA. And these definitions of investment—our contributions and our emotional investment—are related. We feel more connected to and responsible for what we contribute to, and that's partly why service is so important in NA. NA works for us because *we* make NA what it is; it isn't given to us by an outside entity. We

do not “receive” the program from some other authority. Addicts created NA, and we continue creating it each day. We write our literature. We set up our meeting rooms. We mentor and sponsor one another. We do our own public relations and event planning.

On a local level, we may go to service meetings every month or every few months to talk about how to do public relations, grow NA, meet the needs of members, and carry the message to potential members. It's pretty amazing to think that the very experiences that made us unfit to function in the world qualify us to participate in NA service. Because we worked so hard to ruin our lives in the past, we get to save others' lives in the present.



CAR Contents

That's why members take the time to review the *Conference Agenda Report* every two years—because we are responsible for our Fellowship. In NA, our members make the decisions about where we want to focus our efforts and invest our resources—not just financial, but also personal time and energy. A planning process helps us budget our time and money carefully and make more responsible decisions about investing those resources. You will read a lot about the NAWS Strategic Plan in this CAR. The first motion in the CAR asks you to approve the long-term goals from the strategic plan.

The second motion is to approve the informational pamphlet (IP), “Mental Health in Recovery.” One of the focuses in this *Conference*

Agenda Report is on better integration of the different streams of ideas—the CAR survey, the strategic plan, and regional motions. “Mental Health in Recovery” is an example of a project that was initiated as a result of both a regional motion and prioritization in the CAR survey. We believe it will be extremely useful for members and potential members.

The next three motions in the CAR have to do with our legal responsibilities to protect the NA Fellowship’s property. These motions are related to the *Fellowship Intellectual Property Trust (FIPT)*, the *FIPT* Operational Rules, and the Use Policy. The readers’ notes to the *FIPT* explain:

The purpose of the *Fellowship Intellectual Property Trust* is to lay out the collective decisions the Narcotics Anonymous Fellowship has made over the years concerning its literature and logos. . . . In this one comprehensive document appear the policies our entire fellowship has created to preserve the integrity of its published message and the accountability of its publishing services.

Because NA’s literature belongs to the Fellowship as a whole, we make collective decisions about the use and protection of our intellectual property. This is part of how we invest in our vision and how we preserve NA’s collective resources for the members yet to come.

Our Basic Text reminds us that “Everything that occurs in the course of NA service must be motivated by the desire to more successfully carry the message of recovery to the addict who still suffers,” and our literature is where the collective experience of our Fellowship over time expresses that message. The *FIPT* helps us ensure that it is protected for generations to come.

In addition to these five motions from the World Board, this CAR includes eleven motions from regions and zones. We have grouped these motions by topic to make them easier to workshop. Also, where possible, we included the ideas in these motions in the CAR survey lists so that they can be prioritized in relation to other recovery literature and service material ideas.

This is the third time we have included a survey in the CAR to get input on priorities for

recovery literature, service material, and Issue Discussion Topics. This time, we also are including some questions about the ways we categorize published material and how to make it more accessible to members.

The CAR also always includes some explanatory essays. In addition to the essays that introduce each of the Board’s motions, the pages that follow include an overview of the work of the last cycle, a summary of the Issue Discussion Topics, the WSC of the Future Project, and how to prepare for WSC 2020.

CAR Distribution

We mail copies of the CAR at our cost to all Conference participants, regional service committees, and zonal forums. Other members or service bodies can purchase hard copies from NA World Services for \$13.50. The price includes shipping and handling, but not taxes. Members also can download the CAR free from www.na.org/conference. The English-language CAR is published 150 days before the WSC, and the translated versions (French, Portuguese, Spanish, Swedish, and, for the first time, Arabic!) are published a month later—this time by 26 December 2019.

If this is the first time you’ve read a *Conference Agenda Report*, it may seem a bit daunting. Don’t be discouraged. We all felt that way once. Over time, you’ll get used to the acronyms and issues. There is a glossary to help define some terms and tally sheets to record your votes on motions and the survey. The CAR survey is also posted online at www.na.org/conference for any member to fill out before 1 April 2020. Not long after the CAR is published, we will post PowerPoint presentations and videos of the content on www.na.org/conference to help members put on or prepare for CAR workshops.

Overview of the Past Cycle

The WSC marks the end of one cycle and the beginning of the next. The essays in this CAR describe the work of several of the 2018–2020 projects: *FIPT*, Mental Health IP, and WSC of the Future. In addition to these projects, we continued the “toolbox” approach to service material development. The Local Service Toolbox

and Conventions and Events Toolbox Projects both utilized web meetings, online drafts, and emails to put together service materials with the help of any interested member. This is a more economical approach because it doesn't require a funded in-person workgroup, and it's a more inclusive approach because anyone who is able can join the web meetings.

Local Service Toolbox (www.na.org/toolbox) has published *CBDM Basics* and *Serving NA in Rural and Isolated Communities* and is currently at work on "GSR Basics." The CAR survey responses will help Conference participants establish the focus for the Local Service Toolbox in the cycle ahead. Conventions and Events Toolbox (www.na.org/conventions) has published two pieces, *Money Management* and *The Program Committee and Development of the Program*, and is currently working on "Contracts and Negotiations." The work on this toolbox will also continue through the upcoming cycle.

Another project that will carry over to the next cycle is the Spiritual Principle a Day Project (SPAD) (www.na.org/spad). An idea for a daily meditation book was prioritized in the 2016 CAR survey. After surveying members about what they would like to see in such a book, the Board presented a project plan to the 2018 World Service Conference for a book that explores a spiritual principle each day. In the course of the last two years, it's been exciting to watch the book take shape. Because of the nature of a daily book—366 discrete entries that do not have to have a common voice—it's been a great opportunity to ask members to submit writing on spiritual principles. As in all of our literature projects, the workgroup uses these raw materials to put together a finished product that really reflects the voices of our members because our members did the writing. One of the beautiful things about this stage of the process is that input can be submitted in ANY language. The workgroup reads through everything to identify key ideas and themes and glean personal experiences and applications of spiritual principles that stand out. Some input may be used as is; most will be woven together with writing submitted by other members. There is more information on how to submit writing at www.na.org/spad.

If you want to get a sense of how the book is shaping up, now is a good opportunity. By the time the CAR is published, the second batch of text will have been released to the Fellowship for review and input. You can find it posted on the project page (www.na.org/spad) along with a form to guide your input. Let us know what you think.

Another piece of literature we've talked about a lot this cycle is a potential piece of literature related to Drug Replacement Therapy (DRT) and Medication-Assisted Treatment (MAT) as it relates to NA. In short, we had hoped to include a project plan in the CAT for literature on the subject, but we remain uncertain of what the Fellowship would like to see reflected in a piece of literature. This topic was an Issue Discussion Topic for this cycle, and that section of this CAR explains the issue in more detail. For more information, see page 22.

As members of the Board, we facilitate workshops all around the world and, as different as our communities and circumstances can be, we are all motivated by the passion to carry the NA message. How can we make NA meetings, literature, and service tools more accessible to members and still-suffering addicts? What can we do to make it easier for addicts to stay in the rooms long enough to hear our message? These questions animate every bit of the content in this CAR.

We go to great lengths to make information available and accessible. This cycle we had web meetings for Conference participants every other month, and we hold regular web meetings on PR, inmate step writing, H&I, phonelines, zonal FD and PR, and serving in rural and isolated communities. All of our projects utilize web meetings either for workgroup members to meet or, in the case of the toolbox projects, for interested members to work together to develop materials.

This cycle we also had a web meeting open to all interested members to begin collecting best practices of online meetings. Notes from the web meeting are posted in the Miscellaneous section of the Conference web page: www.na.org/conference. Online meetings have made the NA program accessible to some addicts who might otherwise struggle to get to meetings. While

some of our members have years of experience, many of us are relatively new to meeting virtually, and it was really helpful to hear about what's working well and how online meetings deal with things like literature availability and the Seventh Tradition. This topic was prioritized for discussion at the last Conference, and we plan to hold another such web meeting after the WSC.

Technology has certainly enhanced our ability to communicate with members around the world and post issues and materials promptly for feedback. It has been both productive and unifying to gather online to discuss issues with Conference participants throughout the months of the cycle. At the last WSC, we were able to connect delegates and alternates who could not obtain visas with the Conference through the internet, and we plan to do so again in 2020. That is pretty amazing when you stop to really think about it. Now all we need is jetpacks!

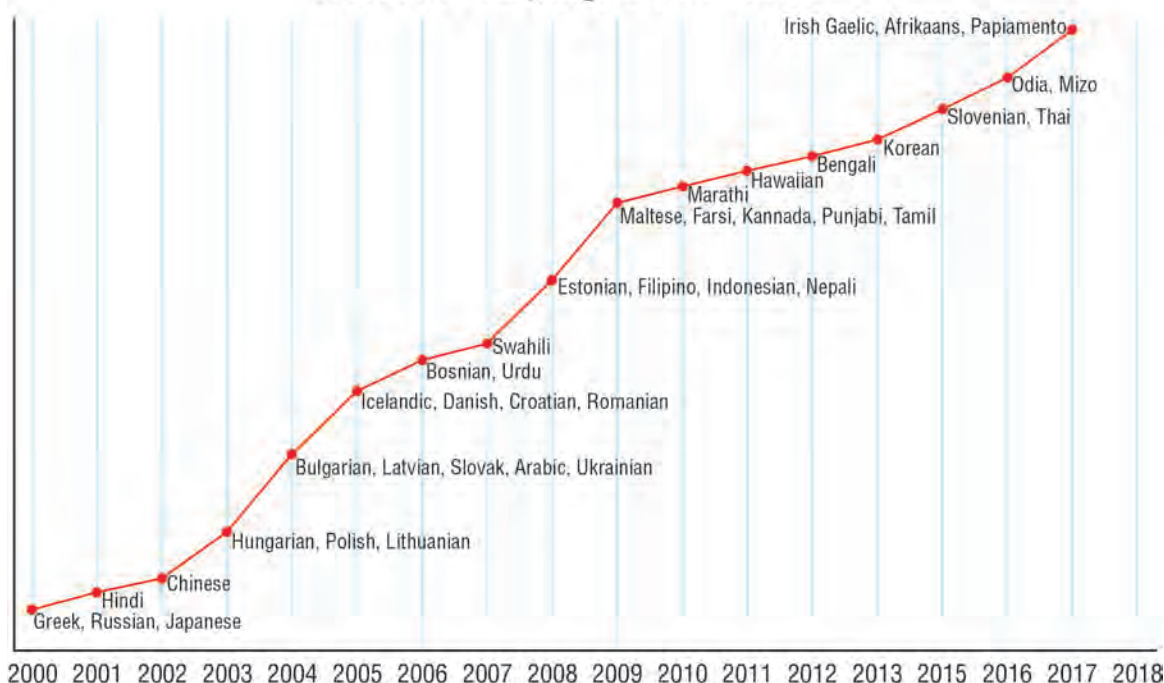
But NAWS has always been committed to accessibility, and some of that has less to do with internet technology than it does with full presence. There's a reason why we say, "Hugs not drugs." From our perspective, virtual connections cannot fully replace meeting in person for NA service work. The WSC is a weeklong event, and we offer funding for every delegate, the

HRP, and the WSC Cofacilitators. (We do appreciate that some regions are able to fund their own delegates and do so—thank you!) This is also an investment in our vision.

As members of the Board, we are privileged to travel to many zonal forums, events, and service body meetings that have requested our participation. We also participate through an internet connection when practical. In some cases, we fund travel for members or delegates who might not otherwise have the opportunity to meet together, as is the case for the African Zonal Forum, for instance. Serving NA is not different from personal recovery in this sense—we can do together what we cannot do alone. After a few days in a service meeting together, bonds are forged that can help strengthen whole communities and grow NA. Our travels strengthen communication between the Fellowship and NAWS, and input from these Fellowship development trips informs the NAWS Strategic Plan. This activity is costly, but it's a worthwhile investment in our vision. At every Conference, we devote time to report on those Fellowship development efforts, and we include a complete list of travel in the *Conference Report*.

Translations have always been an obvious example of the work we do to make the NA message

Welcome Keytags 2000–2018



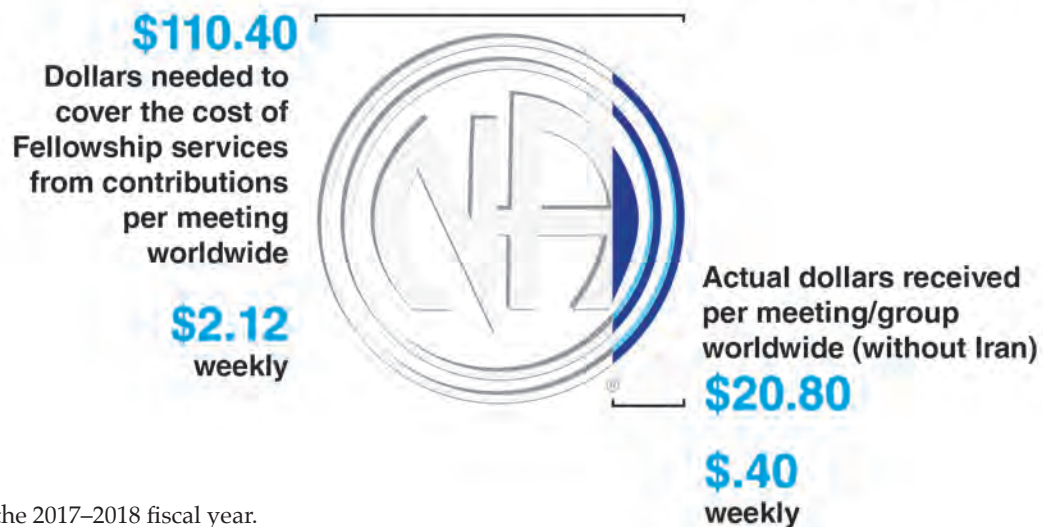
more accessible. We now translate materials into 55 languages, and we publish the Basic Text in 32 languages. We can welcome people to NA in more than 50 languages. For a complete list of translated recovery literature and service material, see Addendum F in this CAR.

We have also been making some inroads in improving accessibility for our deaf and hard-of-hearing members. At WCNA, we held a workshop about better serving these members, and we have a page with some resources on our website: www.na.org/asl. Thanks to the

help from a member who volunteered, we also were able to provide an ASL interpreter on the online meetings webinar. We hope to continue to improve access in this area.

That's just a sampling of NAWS activity since WSC 2018. Every *Annual Report* includes a chart showing the contributions needed from each meeting worldwide to cover the cost of services NAWS provides directly to the Fellowship. You've just read about some examples of how those contributions are investments in our vision.

Worldwide Fellowship Support Cost per Meeting per Year



As of the 2017–2018 fiscal year.

For more information on the work of World Services, see the *NAWS Annual Report* posted at www.na.org/ar, *NAWS News* at www.na.org/nawsnews, and the *Conference Report*, which will be published shortly before the WSC and posted on the Conference page at www.na.org/conference. If you're interested in keeping up

with NAWS' activities, and you don't have a subscription already, you can get an electronic subscription to *NAWS News*, NAWS email updates, and other periodicals here: www.na.org/subscribe.

Strategic Planning

Every two years since 2002, the Board puts together a strategic plan for the upcoming cycle. The first motion in this *Conference Agenda Report* is a motion to approve the long-term goals in the NAWS Strategic Plan. The long-term goals in the plan are the goals World Services needs to reach to fulfill our part of A Vision for NA Service.

The long-term goals have always been a part of the strategic plan. They do not change every cycle, but the rest of the plan does. The plan outlines the work we would like to accomplish during the next two years in order to move closer to our vision. The strategic plan primarily addresses areas in which our work grows and changes; much of our work remains relatively consistent from year to year and is not covered in the plan.

This diagram shows how the components of the strategic plan connect to A Vision for NA Service and to the project plans approved at each WSC.



From Scanning to Projects: The Planning Process

When we do an environmental scan every two years, we look at factors inside and outside of NA that may affect us. As a Board, we use the information gathered in the environmental scan to determine the strategic plan's *objectives*; these objectives are the goals we want to accomplish in the near future. Then the Board thinks about *approaches* to the objectives. Approaches describe the work we can do to reach our objectives. And finally, as a Board, we prioritize what we believe we can accomplish in the next two years.

The project plans included in the Conference Approval Track (CAT) material with the proposed budget all stem from these priorities. The strategic plan always contains more objectives and approaches than we know we can achieve in a cycle, and often there are more projects proposed than we expect to complete. This allows flexibility to utilize resources where and when they are available while remaining accountable to the Fellowship.

For example, one thing that comes up regularly when we do an environmental scan is the need for simple, easy-to-understand tools to use at a local level. The 2018–2020 NAWS Strategic Plan includes a Training and Tools section related to this need. The two objectives under Training and Tools intended to meet those needs are:

OBJECTIVE 4: Continue to develop easy-to-use, relevant training and tools.

OBJECTIVE 5: Increase the responsiveness of the tool development process.

Two of the approaches under these objectives were to continue developing items for the Local Service Toolbox and the Conventions and Events Toolbox.

We held web meetings throughout this cycle for both of these projects, inviting any interested member to help with the work. We finalized drafts of *CBDM Basics* and *Serving NA in Rural and Isolated Communities*, and we are currently

working on “GSR Basics” for the Local Service Toolbox. The Conventions and Events Toolbox Project finalized drafts of *Money Management* and *The Program Committee and Development of the Program* and is currently working on “Contracts and Negotiations.”

We plan to continue working on the Conventions and Events Toolbox in the upcoming cycle and ask the WSC to set priorities for local service tools to develop next using the CAR survey results as a resource. (For more information, see the introduction to the CAR survey on page 24.)

Increasing Collaboration in Scanning

As we have regularly reported in *NAWS News* (www.na.org/newsnews) and elsewhere, we have been making an effort to increase collaboration with Conference participants in our planning process.

The plan belongs to NA as a whole. It articulates the work we intend to do on the Fellowship’s behalf.

One of our primary responsibilities, as a Board, is to listen carefully and to be responsive to the needs and interests we hear articulated. The scan and resulting plan are shaped by the conversations we have with members, what we hear when we travel to service bodies and events, the emails and calls we receive, and the discussions at the WSC and on web meetings—all of our interactions with the Fellowship throughout the cycle. But that process may feel abstract to many members and may not be perceived as a way to contribute directly to the strategic plan.

In recent years, we tried some new things to involve Conference participants more concretely in the planning process. For the past two cycles, we have surveyed Conference participants to gather their input to the environmental scan. This gives regions and zones a direct line to participate in the planning process.

This is a new process for us, and we are learning what works. This cycle, we made some changes based on our first attempt to survey Conference participants, and we will most likely make other

changes in the cycle ahead. The more regions and zones that contribute to the environmental scan, the more complete our vision of the needs of NA will be.

Sustainability and Collaboration

The planning process allows us to think holistically about the work of a cycle and to make responsible strategic decisions about where to put our efforts. We consider the human and financial resources available and the priority approaches, and we draft a set of project plans to include in the CAT material accordingly.

We hope that developing a collaborative planning process and using the CAR survey to help inform priorities for service material and recovery literature will provide a clear path for regions and zones to see their needs and ideas reflected in the process.

We’ve spent a lot of time discussing how to raise Fellowship awareness of the plan and how to increase Conference participants’ involvement in creating it. A collaborative approach to the environmental scan was a good first step. At WSC 2020, we intend to try some further steps:

- We are asking the Fellowship to approve the long-term goals in the plan.
- We will make a motion to have the Conference approve the 2020–2022 strategic plan. (We always include the plan with the Conference Approval Track material, but we only ask the WSC to approve the individual project plans. This time we will ask the WSC to approve the plan as a whole.)
- We intend to begin the process of creating the next strategic plan—which will be the 2022–2024 strategic plan—at the Conference itself.

The planning process is fluid and responsive, allowing us to address new trends and issues as they arise. We revisit the plan each Conference cycle to outline our work for the years ahead and to make sure that the plan and our strategic planning process are keeping pace with our rapidly changing Fellowship and the world at large.

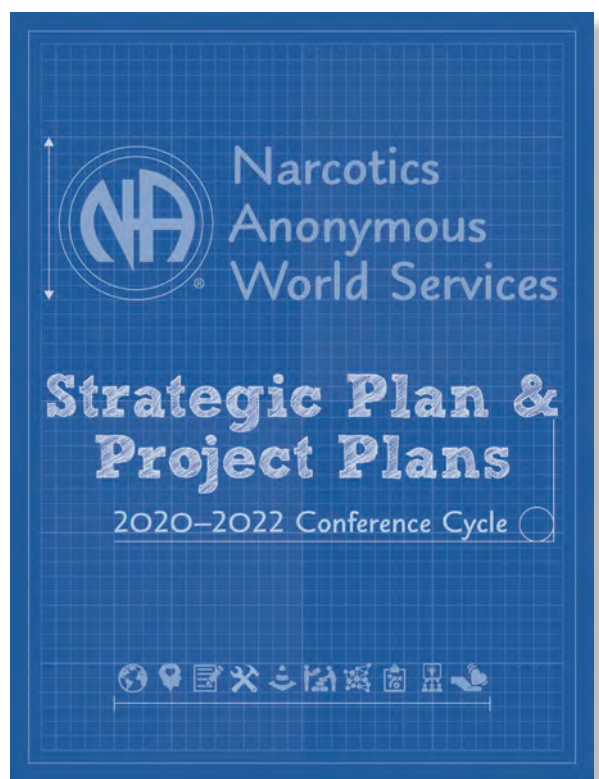


Long-Term Goals

As we stated at the beginning of this essay, we are asking the Fellowship to approve the long-term goals of the NAWS Strategic Plan. The plan's eight long-term goals are listed below. These are the things we believe we must accomplish to achieve our vision. They are ambitious, yet we have made definite progress toward each of them in the years since we began strategic planning. For instance, number four is about using technology to improve communication and access for members. Here are just a few of our improvements in this area:

- We now use online meetings to gather trusted servants to discuss best practices. We held Conference participant web meetings every other month this cycle, which has improved communication tremendously.
- We use online surveys to gather front-end input for all of our literature projects.
- We post drafts of works-in-progress online for review from members and use online forms to help members submit input easily.
- We have increased email correspondence to engage and inform Conference participants more consistently.
- We hold online meetings for workgroups and the Board. Some workgroups meet online exclusively.

Goal number seven is about building consensus at all levels of service. We made great strides toward that goal at the last World Service Conference when the WSC decided to eliminate formal business and utilize a less



formal consensus-based process to discuss and decide on issues. We also developed a tool for local service, *CBDM Basics*, which is posted at www.na.org/toolbox.

Those are just a couple of examples of what NAWS is doing to fulfill our long-term goals.

We plan to talk with participants at the WSC about how to continue moving closer to achieving them. In order for this work to really belong to all of us, we are asking for your support, understanding, and agreement to the long-term goals.

Motion 1 To approve the NAWS Long-Term Goals, which serve as the foundation of the NA World Services Strategic Plan.

Intent: To take a next step in creating a collaborative strategic plan for NA World Services.

Financial Impact: None

Policy Affected: None

NAWS Long-Term Goals

In a continuous effort to realize our vision, NA World Services strives to achieve these goals:

1. NA is understood and accepted as a relevant, reliable, safe, compatible, and spiritual program of recovery by addicts for addicts.
2. A network of worldwide trusted servants acts as an effective, consistent NA resource for local governments, professionals, and the media.
3. NA is a truly global Fellowship with increasing access to literature in all languages and a commitment by all to work together to grow the Fellowship.
4. Technology is used more effectively to communicate in a timely manner, make it easier for members to contribute and participate, expand access to workshops and service tools, and support Fellowship development efforts worldwide.
5. Every member understands the concept of self-support and demonstrates commitment to the Fellowship by contributing of their time, abilities, and available resources.
6. We are able to grow the Fellowship, develop literature, and improve our ability to carry the NA message by operating a sustainable organization with sufficient revenue, human resources, and infrastructure.
7. More members are discussing and building consensus on issues at all levels, generating a greater sense of trust in the global decision-making process.
8. All components of the service system work collaboratively to realize our NA Vision and goals.

Mental Health in Recovery

The process for creating this new IP began from two sources. This regional motion from the 2016 CAR was passed by consensus at the WSC:

Motion 3: That the NA World Board develop a project plan which includes a budget and timeline to create an informational pamphlet specifically about mental illness and recovery for consideration at the 2018 World Service Conference.

Intent: To have a fellowship approved, clear Narcotics Anonymous message about the important issue of mental illness and recovery that is available in a pamphlet format.

Mental health was also one of the most highly prioritized topics in the booklet- or pamphlet-length recovery literature section of the 2016 CAR survey. With this direction from the Fellowship, work on framing the project plan and gathering members' thoughts began with a survey open to any interested member. We received over 1,500 individual responses to the questions in the survey from 48 states in the US and 27 other countries between November 2016 and June 2017. This input helped shape the project plan included with the 2018 Conference Approval Track material.

This excerpt from the project plan sums up the input:

The majority of members prefer an easy-to-read pamphlet that is warm, welcoming, and empathetic. We received many comments that this pamphlet should address the stigma and shame surrounding mental health issues, and assure members that this is not an unusual issue amongst recovering addicts and that recovery is possible in NA. It seems apparent that we need to have more exposure to, and discussion of, the ideas already contained in *In Times of Illness*, which do not seem to be well-known by many of our members.

WSC 2018 approved the project plan, and over two-thirds of Conference participants rated its priority as "high." The Board put together a workgroup who met face-to-face in September 2018, using the survey input as the initial source material for their work.

Both the workgroup and a focus group subsequently met online to complete a draft that was then reviewed by the workgroup and the Board. The draft was posted for input from any interested member of the Fellowship from 1 February to 15 May 2019. We received 498 responses to the draft from throughout the US and 15 other countries. The workgroup met again in June 2019 to consider the Fellowship's input and to develop the approval draft of the IP.

In the Narcotics Anonymous program, every addict with a desire to stop using can be a member, and no member of NA need ever recover alone. Recovery is our common bond. Even though some of us may feel hopeless because of the wreckage of our active addiction, we are not helpless. We are able to benefit from the experience and suggestions of other members who are recovering in NA.

"Mental Health in Recovery" Approval Draft IP

The informational pamphlet has topic headings to assist members who have specific concerns. Some ideas about mental health conditions in recovery are reiterated throughout the piece, as we believe it is helpful to illustrate their significance. As an example, we thought that experience with maintaining one's recovery and mental

health well-being is important, so it is mentioned a few times. To support the experience in this IP, we have included quotes from members and quotes from the Basic Text, *It Works: How and Why, Living Clean, Just for Today, In Times of Illness, and Guiding Principles*.

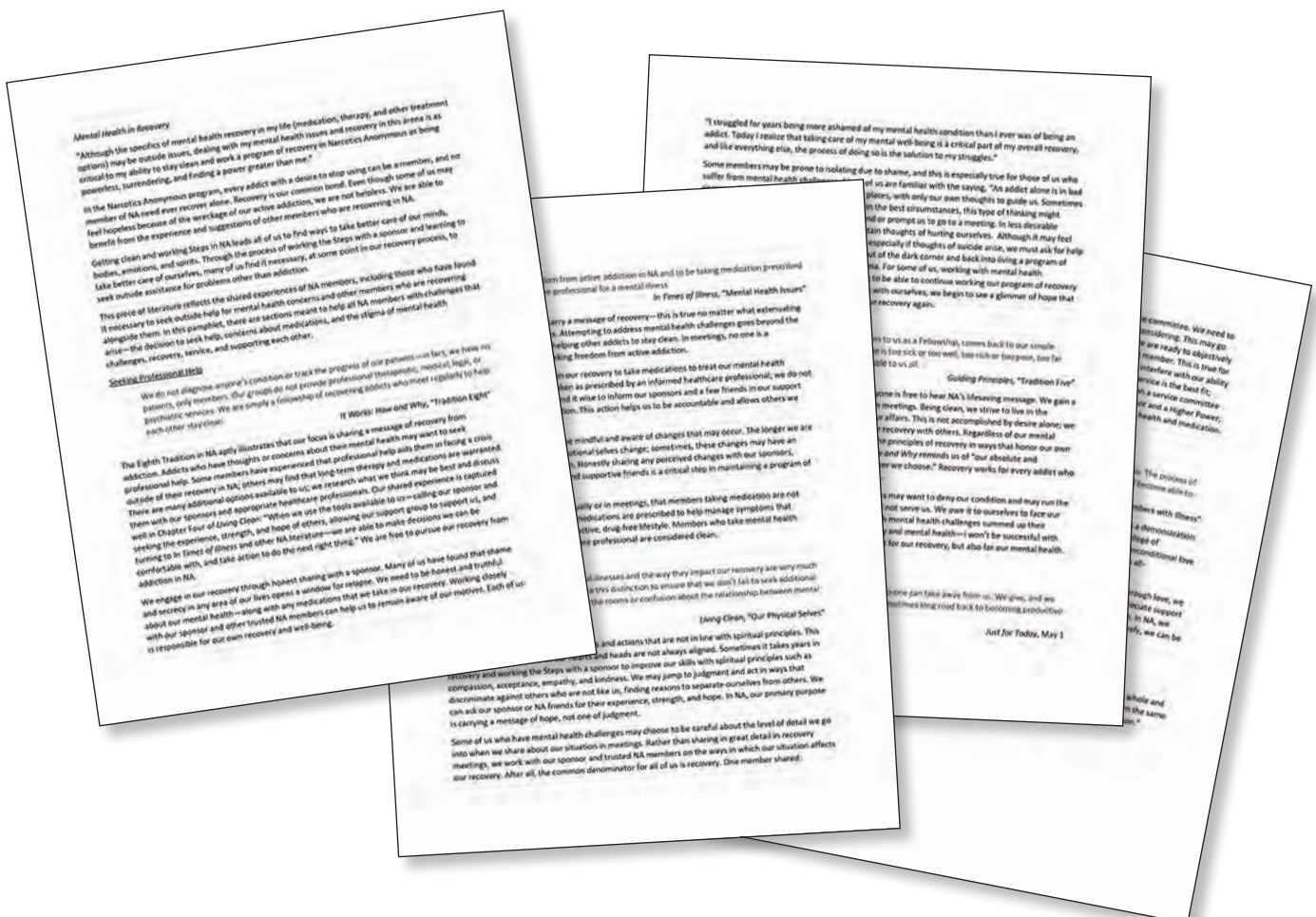
We are pleased and grateful to present that piece here for the Fellowship's consideration.

Motion 2 To approve the IP contained in Addendum A, "Mental Health in Recovery," as Fellowship-approved recovery literature.

Intent: To have a piece of Fellowship-approved material available about this issue as a resource for NA members.

Financial Impact: The cost of creating this material has already been incurred. The only additional costs that would result from adopting this motion are initial production costs, which would be minimal.

Policy Affected: None



Fellowship Intellectual Property Trust

This *Conference Agenda Report* (CAR) includes three motions (Motions #3–#5) related to the *Fellowship Intellectual Property Trust* (FIPT). Motion #3 proposes changes to the *FIPT* Operational Rules; Motion #4 proposes changes to *Intellectual Property Bulletin #1*, more commonly referred to as the Use Policy; and Motion #5 would initiate the process to revise the *FIPT* itself in the future.

We will try to explain the origin of these three motions and the changes they are recommending as straightforwardly as possible in this essay. A copy of the *Fellowship Intellectual Property Trust*, including the Operational Rules showing all of the changes we are proposing, is included in Addendum B of this CAR. A clean copy of the proposed revision to *Intellectual Property Bulletin #1* is in Addendum C, and a copy showing the proposed changes is in Addendum D. The current version of *Intellectual Property Bulletin #1* is included in Addendum E. In addition, you can find current versions of these documents as well as other material related to the *FIPT* posted at www.na.org/fipt.

HISTORY OF THESE MOTIONS

- WSC 2018 decided to create workgroup
- Workgroup of mostly current RDs and RDAs met virtually repeatedly
- Board discussed and accepted recommendations
- Conference participants discussed recommendations during two web meetings.

What Is the *FIPT*?

The *Fellowship Intellectual Property Trust* is a legal document with a long history in NA. The

FIPT describes in detail how NA's *intellectual property*—our name, trademarks, and recovery literature—are protected and administered by Narcotics Anonymous World Services, Inc., so that NA can ensure our name and literature and trademarks are available to fulfill our primary purpose. The *FIPT* is first and foremost about the integrity of the NA message and the need to protect NA's property so that the Fellowship of NA can continue to own its own materials.

The *FIPT* explains:

The sole object and purpose of this Trust is to hold and administer all recovery literature and other intellectual properties of the Fellowship of Narcotics Anonymous in a manner that will help addicts find recovery from the disease of addiction and carry that message of recovery to the addict who still suffers, in keeping with the Twelve Steps and Twelve Traditions of NA.

(*FIPT*, Article I, Section 4)

Where Did This Project Come From?

The *FIPT* Operational Rules and Bulletins Workgroup was on a list of virtual workgroups agreed to at the 2018 World Service Conference.

During the 2016–2018 Conference cycle, a region made a request to inspect the property of the Trust. The inspection took place shortly after WSC 2018, and you can find the report from that inspection on the *FIPT* web page: www.na.org/fipt.

This was the first time since the *FIPT* was adopted in 1993 that such a request had been made, and it raised some questions for us about the inspection process as it is described in the Operational Rules. We talked with participants at the Conference about revisions we believed were necessary to update the section of the Operational Rules that describes how an inspection of the Trust can be performed.

In a straw poll, the Conference expressed consensus support (93-15-4-2) that a change was needed to Article V, Section 3, the part of the Operational Rules that we refer to as the *Inspection Clause*.

The Board presented a possible revision of the Inspection Clause, but did not ask the WSC to make a decision about these specific changes:

**ARTICLE V, SECTION 3:
INSPECTION OF TRUSTEE ACTIVITIES**

Conditions of inspection

~~Any regional service committee or equivalent service body~~ The World Service Conference may inspect the records and operations of the Trust on behalf of the Beneficiary, ~~providing the following conditions are met if it so chooses. The details of such an inspection would be decided by the WSC.~~

The Conference decided, with consensus support (89-22-0-2), to suspend the Inspection Clause until the close of WSC 2020, so that a decision could be made about how to handle inspections in the future.

And so, the Conference agreed that a virtual workgroup should look at the Operational Rules and FIPT bulletins. The Board created a workgroup composed of three US regional delegates, three US alternate delegates, a Board member as point person, and a member from outside the US with decades of World Service experience, including as a member of the Board of Trustees, Board of Directors, and World Board. The majority of workgroup members were at the 2018 WSC, had heard the discussions, and understood the concerns that led to the workgroup's creation.

The workgroup met online throughout the Conference cycle. They offered a series of recommendations that the Board discussed at several meetings. After making some relatively minor edits to the documents, the Board accepted the workgroup's recommendations and discussed them with Conference participants during a web meeting in August 2019. After that web meeting, we made some nonsubstantive wording changes suggested by our intellectual property attorney; these were simply semantic changes, not changes to the substance of the recommendations. We then discussed our recommendations with Conference participants again during the October 2019 Conference par-

ticipant web meeting. The end result is the three motions contained in this CAR.

Operational Rules

The Operational Rules describe the way the *FIPT* is to be administered. Section 2 of the Operational Rules explains their purpose in detail:

These rules describe the way the Fellowship Intellectual Property Trust is to be administered. They describe the intellectual properties held by the Trust, the parties to the Trust, the rights and responsibilities of each of those parties, and the relationship between them. They also describe specific means by which the rights and responsibilities of the Trustee can be revoked and reassigned, and the procedure to be used in altering specific provisions of the Trust Instrument itself.

There have been changes to the Operational Rules since they were initially drafted, but this is the first time we've taken a comprehensive look at updating them.

The most substantial changes we are recommending to the *FIPT* Operational Rules are to the Inspection Clause, Article V, Section 3 of the Operational Rules. The workgroup talked for a long time about the Inspection Clause, building on the possible revision the Board had presented at the Conference.

The Trust's beneficiary is the NA Fellowship as a whole, and the *FIPT* is clear that the World Service Conference (WSC) is the body authorized to make decisions on behalf of the Trust's beneficiary. The revisions we are proposing would extend this logic to the Inspection Clause.

Here is what the Operational Rules currently say about the parties of the Trust:

ARTICLE I, SECTION 3: PARTIES OF THE TRUST

Trustor: The Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference

Equitable ownership of the recovery literature, trademarks, service marks, and all other intellectual properties of the Fellowship of Narcotics Anonymous resides with the Fellowship

itself, the basic collective unit of which is the NA group. Decisions concerning NA's intellectual properties directly affect each individual NA group as well as NA as a whole. For this reason, such decisions are made by the duly authorized representatives of the NA groups, their regional delegates, when those RDs gather at NA's World Service Conference. By such means, the Fellowship of Narcotics Anonymous acts as the Trustor of the Fellowship Intellectual Property Trust and is responsible for the creation, approval, revision, and decommissioning of NA recovery literature, trademarks, service marks, and other intellectual properties. The Trustor's specific rights and responsibilities are detailed in Article III of these rules and in the currently applicable service manuals.

We are proposing a change in the Inspection Clause so that only the WSC, on behalf of the beneficiary, the NA Fellowship, could make the decision to undertake an inspection. Only the WSC can speak for the NA Fellowship as a whole regarding the *FIPT*. This change seems consistent with the *FIPT* itself as well as how we make decisions about any other aspect of service. We make decisions through a group conscience process. It seems appropriate to us that a decision to inspect the trust, which is a costly and time-consuming endeavor, would be a decision made by the trustor and not by a minority of Conference participants. There is no other aspect of World Services or Conference work where a small number of regions can direct activity rather than relying on the conscience of the WSC itself.

It may be helpful to note that most of the questions members raise about NAWS' financial operations can easily be answered by referencing the financial statements we publish. We publish a two-year budget and explanatory cover sheet in the Conference Approval Track material before each WSC and the *NAWS Annual Report* each spring. We are audited annually, and the report from that independent audit is made available in each *Annual Report*.

The other major change we are recommending to the Inspection Clause is revisions to make it easier to understand. We are proposing add-

ing more language to the Inspection Clause so that it better explains to members how an inspection would work. Much of the language we are suggesting to help clarify the Clause is excerpted from other sections of the Trust and Operational Rules.

The new language we are recommending to you for the Inspection Clause is:

SECTION 3: INSPECTION OF TRUSTEE ACTIVITIES

The Fellowship of Narcotics Anonymous, as given voice by its groups through their regional delegates at the World Service Conference, is the Settlor and the Trustor of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. Only the Trustor can request and conduct an inspection of Trustee activities on behalf of the Trust Beneficiary. With the exception of any subject and items excluded by law, there are no limitations on what the Trustor can inspect.

Under Article IV, Section 12 of the Operational Rules, and consistent with California law, Narcotics Anonymous World Services, as Trustee, is required to, among other things: (1) give a year-end financial report of the previous fiscal year; (2) cause an audit to be performed by an independent certified public accountant of the Trust for the previous fiscal year; and (3) deliver a copy of both the financial reports and independent audit to all participants of the World Service Conference.

If, after a review of the financial reports and independent audit, a member or service body has questions or concerns, they can contact the World Board. If questions or concerns still remain after contacting the World Board, they would then be discussed through the established Narcotics Anonymous service structure. This discussion would be initiated by any region, through its regional delegate, submitting a request by motion to the Trustor, at the World Service Conference, through the *Conference Agenda Report*.

We are also proposing other, less substantive changes to the Operational Rules as follows:

- A change to the description of WSC Boards and Committees on page 11 of the Operational Rules to better reflect our current structure. The *FIPT* was written before the World Board was created, and the suggested language describes our current system, not that of 1993.
- Two edits to Section 12: Trustee Reporting Obligation on page 31 to change *calendar year* to *fiscal year* and to add *independent* to the description of the annual audit.
- Changing *representatives* to *delegates* on page 24 of the Reader's Notes.
- Correct errors by adding the word *the* on the same page and other edits on pages 15 and 31.
- A change to the way the Inspection Clause is described on page 37 of the Reader's

Notes so that the description reflects the changes suggested to the Inspection Clause itself.

These bulleted changes are primarily “house-keeping” edits to update the language of the Operational Rules to reflect current practice and to be consistent within the document itself.

The easiest way to see how the recommendations we are making would change the Operational Rules is to look at the revised version of the *FIPT*, with changes tracked, that is included in Addendum B of this CAR. The changes for the Inspection Clause are shown on pages 16 and 17 of that document.

We believe it is important that the Operational Rules mirror the *FIPT*, and any changes to the *FIPT* have to be initiated by a motion in the CAR. Therefore, we are only recommending changes that are consistent with the current text of the *FIPT*.

Motion 3 To approve the revisions to the *FIPT* Operational Rules contained in Addendum B.

Intent: To revise the Operational Rules to reflect discussions at WSC 2018 about the Inspection of Trustee Activities and to reflect current practices, terms, and language.

Financial Impact: None at this time.

Policy Affected: Would replace the existing policy that is struck through in Addendum B.

A summary of the proposed changes shown in Addendum B includes:

- A change to the Inspection Clause to reflect discussions at WSC 2018 and clarify that only the WSC can act for the beneficiary—the NA Fellowship as a whole.
- Various “housekeeping” edits:
 - o A change to the description of WSC Boards and Committees on page 11 to the World Board.
 - o Two edits to Section 12: Trustee Reporting Obligation on page 15 to change *calendar year* to *fiscal year* and to add *independent* to the description of the annual audit.
 - o Changing *representatives* to *delegates* on page 24 of the Reader's Notes.
 - o A straight copyedit by adding the word *the* on the same page and other edits on pages 15 and 31.
 - o A change to the way the Inspection Clause is described on page 37 of the Reader's Notes.

Use Policy

In addition to the Operational Rules, we are recommending changes to the Use Policy, which is described in *Intellectual Property Bulletin #1* (IP Bulletin #1). The bulletin spells out the conditions under which groups and service bodies can use and reproduce NA's recovery literature and registered trademarks.

We are suggesting a substantial rewrite of the bulletin, which makes it difficult to read the version of the document that has the proposed changes tracked. Therefore, we are including the text that we are proposing in Addendum C, a tracked-change version of the bulletin in Addendum D, and the current version in Addendum E.

These bullets summarize the major proposed changes to the bulletin. We will explain these points in more detail in the pages that follow.

- Permission would be required to reprint book-length pieces. This is the only significant policy change we are recommending to the Use Policy.
- Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats. These are not changes in policy; they are revisions to better reflect current policy.
- The introduction has been rewritten, and the section on copyright has been moved ahead of the section on trademarks.
- We are suggesting some copyediting changes, such as using the term *policy* throughout the document, rather than a mix of *policy* and *guidelines*.

There is a lot of misinformation circulating about these proposed changes, and we will do our best to explain these recommendations here.

Book-Length Pieces

The most significant change to the bulletin would be the proviso that groups must contact World Services for approval if they wish to reproduce book-length pieces of NA literature.



The workgroup and the Board talked about this change for a long time. We believe that requiring approval for the reproduction of books will help protect the Fellowship's materials, but this change to the Use Policy should not hinder a group's ability to address its literature needs.

If a group is financially challenged and wants to reproduce NA Fellowship-approved book-length literature, we urge them to contact World Services to work out a solution. We supply literature for free or at a discount to many members and communities across the globe. We are committed to ensuring that the NA message is readily available at NA meetings.

NAWS has successfully developed and maintained a distribution network that is very good at getting NA literature into the hands of those who need it. If a case arises where the best way for a home group to have literature they need is to print it themselves, permission to do so would typically promptly be granted.

Current Versions of Literature

The remainder of the suggested revisions to *Intellectual Property Bulletin #1* are not changes to policy. We are recommending some copyediting changes as well as revisions to *IP Bulletin #1* to reflect policies that are already in effect.

One such policy is that the permission to quote or reproduce literature applies only to *current* versions of texts. We suggest adding the word

current to clarify that the literature the bulletin refers to is currently approved recovery literature. The reason for this change is straightforward: While NAWS holds the copyrights for all previously published editions, the World Board simply does not have the right to authorize the printing of previous editions of literature. NAWS is only authorized to publish currently approved recovery literature, so these are the only versions we can give someone else permission to reproduce.

Of course, members can use whatever editions they wish to in their personal recovery. But the Conference decided in 1991 and reaffirmed in 2008 that only the most current edition of the Basic Text is approved for publication and sale by NA World Services.

In 1991, the WSC made the following statement and created it as policy:

The Basic Text, Fifth Edition, is the only edition of the Basic Text that is currently approved by the World Service Conference of Narcotics Anonymous for publication and sale. The World Service Office Board of Directors is entrusted with the responsibility for protecting the fellowship's physical and intellectual properties, including the Basic Text, and at the board of directors' discretion, shall take legal action to protect those rights against any and all persons who choose to infringe upon this literature trust.

In 2008, after approving the Sixth Edition Basic Text, the WSC reaffirmed the decision that NAWS is only authorized to produce the current version of the Basic Text, adding this to the statement:

WSC 2008 approved the Sixth Edition Basic Text. It is now the only edition approved for NAWS production with the exceptions called out in the Translations Policy.

Although the discussion of publishing earlier versions of the Basic Text has come up at several Conferences, the Conference has never approved their publication by NAWS. And it doesn't make sense that the WSC would prevent NA World

Services from producing these earlier versions but authorize groups to do so. We don't believe that adding "current" to *IP Bulletin #1* is a change in policy; we are recommending this change in order to clarify a policy that we believe has already been set by the WSC.

Online Posting of Literature

We also are recommending adding language to *IP Bulletin #1* to make it clear that permission does not extend to online or electronic versions of literature. This is another change we are suggesting so that the bulletin would better reflect policies that are already in effect. This is not a new policy, but, like the policy about current versions of literature, it has not been clearly articulated previously in *IP Bulletin #1*.

In the interest of protecting NA's intellectual property, we do not grant permission for anyone to post NA Fellowship-approved recovery literature online directly. NAWS posts IPs and booklets, in a variety of languages, on www.na.org, so that NA websites can directly link to this material. We have discussed this issue a number of times at the Conference and reported about it repeatedly. We encourage anyone with questions about posting NA materials, including *Just for Today*, to contact webmaster@na.org.



Other Proposed Changes

The rest of the changes we are recommending to *Intellectual Property Bulletin #1* are about format and copyediting. We have revised the introduction and reorganized the document by moving the section on copyright so that it comes before the section on trademarks.

We have made a number of copyediting suggestions, such as consistently using the term *policy* throughout the document rather than using the term *guidelines* interchangeably with the term *policy*. Finally, we are suggesting some of the same sorts of changes we recommended for the Operational Guidelines to update the text to reflect current language, for example, using the term *service bodies* instead of *committees*.

Motion 4 To approve the revisions to NA *Intellectual Property Bulletin* #1 contained in Addendum C.

Intent: To revise this bulletin so that it provides more direct and clear guidance, and so that it reflects current practices, terms, and language.

Financial Impact: None that can be anticipated at this time.

Policy Affected: Would replace the existing policy in Addendum E.

This bulletin has been largely rewritten. A clean copy of the bulletin with proposed revisions is contained in Addendum C. A copy tracking the proposed changes is included in Addendum D.

A summary of the proposed changes to *Intellectual Property Bulletin* #1 includes:

- Permission would be required to reprint book-length pieces.
- Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats.
- The introduction has been rewritten and the section on copyright has been moved ahead of the section on trademarks.
- Some copyediting changes are suggested, such as using the term *policy* throughout the document, rather than a mix of *policy* and *guidelines*.

Future Changes to the *FIPT*

Motions #3 and #4 suggest changes to the Operational Rules and to *Intellectual Property Bulletin* #1. These types of changes require notice in the *Conference Agenda Report* and a decision by regional delegates present at the WSC.

Motion #5, the third and final motion related to the *FIPT*, is asking for permission to initiate the process to make changes to the Trust itself. The process to revise the *FIPT* itself must begin at the World Service Conference. Here's what the *FIPT* Operational Rules say about the process of revising the Trust:



ARTICLE VII, SECTION 2: REVISION OF TRUST INSTRUMENT

Provisions of the Trust Instrument may be changed only under the following conditions:

1. Any motion to review proposed revisions to the Trust Instrument must receive the approval of a majority of regional delegates at the World Service Conference.
2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the *Conference Agenda Report* for adoption.
3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of “yes” from two-thirds of those regional delegates recorded as present in the World Service Conference roll call immediately prior to the vote.

The reason we need to update the *Fellowship Intellectual Property Trust* is to reflect the recent Conference decisions to make zonal delegates voting Conference participants. The *FIPT* refers only to regional delegates as the decision makers, not to zonal delegates.

Since we need to initiate the process of revising the Trust to make this change, we will look carefully at any other possible changes to the *FIPT* itself, and then offer the proposed revisions for review and input for at least six months.

The proposed changes would then be included in the 2022 *Conference Agenda Report* for decision at the 2022 WSC at the earliest.

In the meantime, decisions to approve literature or change the Operational Rules will require a record of the vote count for regional delegates only.

It is worth noting that, although the *FIPT* says that a motion to initiate the process must be supported by a majority of regional delegates, Conference policy now stipulates a two-thirds majority for a motion to pass, so by those standards, a motion to begin the process of revising the Trust would only pass if it were approved by two-thirds of regional delegates.

Motion 5 To approve the initiation of the established process to revise the *Fellowship Intellectual Property Trust* in the 2020–2022 Conference cycle.

Intent: To initiate a process to update the *Fellowship Intellectual Property Trust* to include zonal delegates who are seated at the WSC.

Financial Impact: Minimal costs for distribution of material for Fellowship review and input.

Policy Affected: This does not affect any policy at this time but seeks to start the process already specified in the *FIPT* Operational Rules, Article VII: Revision of Trust Rules.

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2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the *Conference Agenda Report* for adoption.
3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of “yes” from two-thirds of those regional delegates recorded as present in the World Service Conference roll call immediately prior to the vote.

1. Build a shared understanding of what is an effective and sustainable WSC
2. Strengthen collaboration among zonal forums and between NAWS and zonal forums
3. Collect and share best practices of zonal forums

Additionally, Motion 15, approved at the 2018 WSC, called for the World Board to develop a project plan “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.” Throughout the course of its work, the workgroup identified potential input to this project plan and forwarded recommendations to the Board in its final report.

For the first time ever, the Board did not put together the project workgroup, but instead invited each of the 15 zonal forums and Iran to choose a participant to serve on the workgroup. This collaborative and collective approach also made it the largest and most diverse World Services workgroup ever. To make the best use of time and resources, the workgroup created three task teams, each focused on one of the three main goals: Effective and Sustainable WSC, Role of Zones, and Zonal Collaboration. The latter two task teams met collaboratively several times to take up overlapping efforts. The workgroup met three times face-to-face (November 2018 and March and August 2019), and the task teams regularly met virtually in between face-to-face workgroup meetings. All task team results were reviewed and discussed by the workgroup as a whole before they were approved and then forwarded as recommendations to the Board.

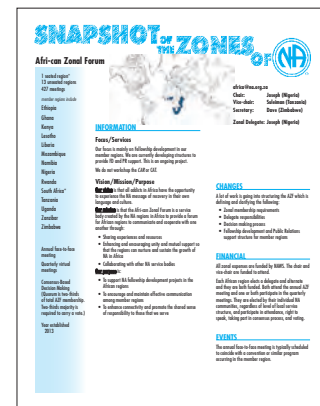
Two previous cycles' projects also focused on the future of the World Service Conference. In 2014–2016, the Planning Our Future Project was created "to continue to evolve the ideas about the future of the WSC generated at WSC 2014." For 2016–2018, the Future of the WSC Project continued by discussion of the effectiveness and sustainability of the Conference and the size and shape of the WSC.

- **Virtual Meeting of Zones**

An informal way for participants from zones to come together to share and collect best practices and explore possible ways to collaborate. The first meeting was held in September 2019, and the zones opted to meet on a regular basis, so meetings will take place every four months. US zones also chose to meet together to discuss coordinated efforts.

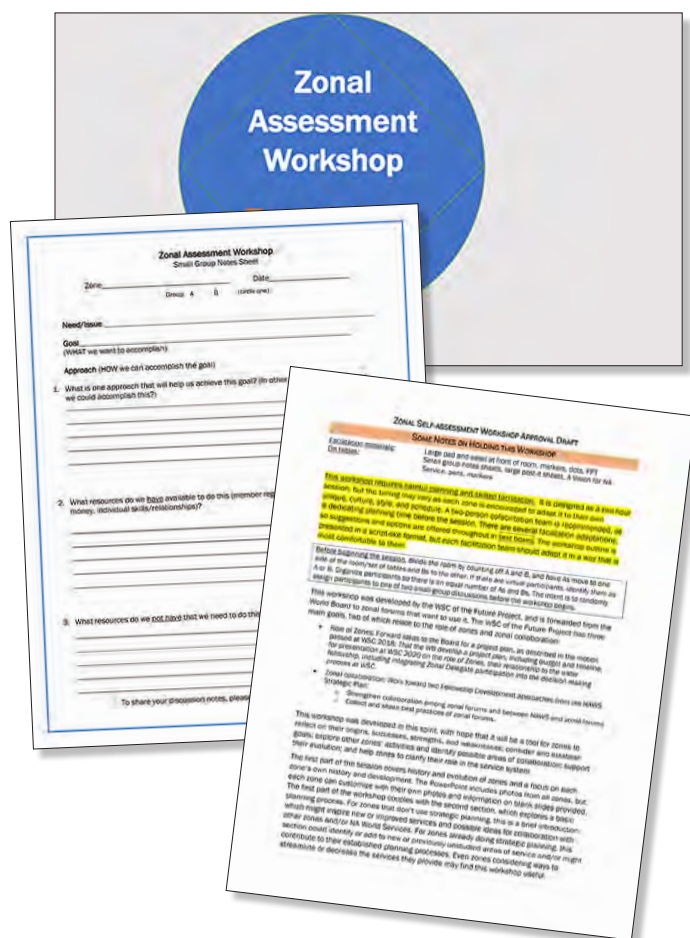
- **Zonal Report Form**

An opportunity for zones to report to the WSC, which will result in a Zonal Snapshots tool that provides a picture of each zone.



- **Zonal Self-Assessment Workshop**

Designed to help zones reflect on their development and how to best meet their needs; this session includes an introduction to planning for zones that have not done planning and can help in reexamining priorities for zones already using planning. Ultimately, the hope is that the workshop will help zones to better carry the NA message. Three zonal forums have used the tool so far, and it is posted on the project website: www.na.org/future.



- **GWSNA Update Recommendations**

Focused on better describing current practices, including that the WSC is more than a biennial event because its work continues throughout the cycle, expanding the references to communication and collaboration to include web meetings and email communication, and possibly adding a sustainability statement. These recommendations will be reflected in the CAT material.

- **Ongoing Discussions**

Centered on what is an effective and sustainable WSC and what that means in relations to the WSC Mission Statement.

- **WSC Evaluation Tool**

If a sustainable WSC is one that has the resources and ability to achieve its mission, an evaluation tool could clarify the qualities needed by the WSC and measure how effectively the WSC carries out its work. We had stopped trying to evaluate the WSC a couple of cycles ago because our return on surveys was too low to be meaningful. We are going to try something again but have not settled on the details yet.

- **Input to the Role of Zones Project Plan**

The plan will be included in the 2020 Conference Approval Track material.

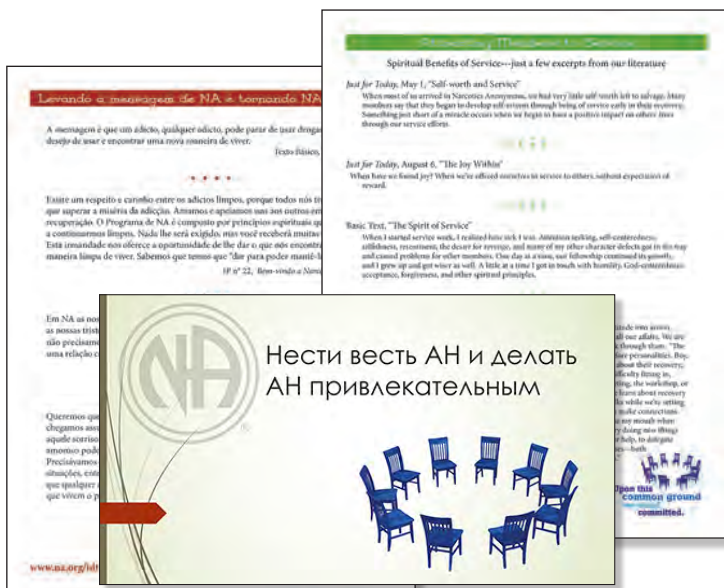
We believe the work and results of this project, along with those of previous cycles and ongoing discussions with Conference participants, will continue to help clarify agreement on what is an effective and sustainable Conference and that it will contribute to our Fellowship's growing commitment to collaborative service efforts to help better carry the NA message. Reports and related materials are posted on the project webpage: www.na.org/future.

Issue Discussion Topics for 2018–2020

Issue Discussion Topics (commonly known as IDTs) are selected each Conference cycle and are issues of Fellowship-wide concern or interest. Conference participants choose these topics, guided by the results of the CAR survey, which is open to any interested member, group, or service body. It is also possible for the World Board to independently add a topic if they believe there is a need to do so, as was the case in this cycle with the third topic listed here. The focus and content of the IDTs can be influenced by discussions and decisions at the WSC.

Conference participants framed the two topics prioritized in the 2018 CAR during a web meeting after the WSC. We continue to be grateful to the trusted servants who were able to give their time and experience to this process.

Resources for local workshops for each topic can be found at www.na.org/idt in English, Spanish, and Russian. We encourage groups and service bodies to hold these discussions in their communities and to forward the results to worldboard@na.org. Once again, as in the last cycle, we have received an increased number of responses to the IDTs, and we are grateful to all the members who have taken the time to share their ideas on these topics. We've included a few highlights below and will provide a summary of the input with the *Conference Report* as in previous cycles.



The three topics for the 2018–2020 cycle were:

Attracting Members to Service

This topic was one of those highly rated in the 2018 CAR survey. The discussion session outline focused on sharing information and best practices and, hopefully, increasing participation in service. Following an introduction that included a brief overview of the structure of our service system, participants were asked to imagine what NA would look like without service. Unsurprisingly, all the responses centered around the critical role of service within NA, and how without service there would be no NA. Most of the personal benefits of service shared were about personal and spiritual growth, increased knowledge, and a greater sense of connection. When asked about what changes could be made to attract more members to service, particularly underrepresented populations, the responses offered ideas about inclusivity, personal behavior, and a focus on our primary purpose.

Carrying the NA Message and Making NA Attractive

This topic was also prioritized in the 2018 CAR survey and focused on better carrying the message and welcoming any addict who comes to a meeting. The session outline opened with members sharing some of their experiences, both positive and negative, of being welcomed into NA. Responses to the questions that were asked showed that members have a clear understanding of what the NA message is, and a variety of ways to demonstrate a commitment to carrying it were mentioned. Much of the input mentions specific actions to make this a reality, including sharing positively, working a Twelfth Step, and actively supporting groups and group support forums. The importance of regular group inven-

tories and workshops to help train and mentor newer members were also mentioned. A commitment to carrying the message was seen as a way to increase unity within NA and help create a positive structure that will encourage newcomers to stay. It was also seen as improving

society's perception of NA as a viable program of recovery. Ideas for ways to welcome newcomers included having a greeter and offering phone numbers, meeting new members "where they're at," and remembering to welcome every addict, "regardless of . . ."

Drug Replacement Therapy/Medication-Assisted Treatment as It Relates to NA

The World Board notified the 2018 WSC that it was likely there would be a third IDT and decided to add Drug Replacement Therapy/Medication-Assisted Treatment as It Relates to NA during the June 2018 Board meeting. The issue of addicts attending NA meetings while being prescribed medication to treat their addic-

tion and the ability of groups to make them feel welcome has become increasingly pressing for many NA groups over the last few Conference cycles. This was identified as having a high impact in the 2016–2018 NAWS Strategic Plan and was the subject of a regional motion in the 2018 CAR:

Motion 9: To direct the World Board to create a project plan for consideration at WSC 2020 to create or revise one piece of recovery literature to directly address Drug Replacement Therapy (DRT) and Medication Assisted Treatment (MAT) as it relates to NA.

Intent: To begin the discussion on how to address DRT/MAT in a piece of recovery literature as it relates to our message and program and have a unified fellowship position.

During a web meeting in July 2018 Conference participants helped to frame the discussion, which aims to gather input, raise awareness among members, and encourage dialogue within the Fellowship about how NA members and groups respond to and welcome addicts on DRT/MAT.

It was intended that the input to this IDT would help shape the project plan called for in Motion 9, and this has been partially successful. We've received a lot of ideas about how we can better welcome members and potential members, and it's notable that these ideas are consistent no matter where the workshops were held. The main ideas shared are:

- Welcome addicts attending NA while on DRT/MAT. They are still NA members and should be treated like any other member.

- Connect members on DRT/MAT with others who had the same experience and achieved abstinence.
- Consider developing consistent language in the form of a statement that can be included in meeting formats.

What we have not heard is input that helps us frame a piece of Fellowship-approved literature about this issue. Unless the Conference can provide us with other directions, we will propose that we frame an additional discussion about this topic for the 2020–2022 Conference cycle that seeks to gather the needed input.



Literature, Service Material, and Issue Discussion Topics

This is the third time we will include a survey in the *Conference Agenda Report* to help set priorities for recovery literature, service material, and Issue Discussion Topics (IDTs). The responses to this survey will help frame delegates' discussions and inform their decisions at the WSC.

We are asking members to fill in the online version of the survey posted at www.na.org/survey by **1 April 2020**, and we will compile those responses for the Conference to consider. We are also asking Conference participants to collect the conscience of their service bodies by 16 April 2020. We will send delegates a link to submit those results when it's closer to the WSC. We will compile those results to distribute as well.

Many of the items in this survey are simply carryovers from the surveys in the previous two CARs. We added ideas we have heard since the last Conference through conversations, emails and phone calls, workshops, and input to the planning process. After compiling all of those ideas, we distributed a draft of this survey to Conference participants for input, and we have added their input to the lists that follow. We also have included all of the ideas in the current CAR motions.

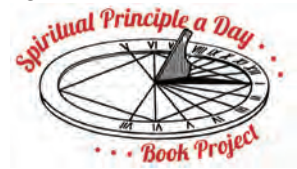
Members' responses to this survey will help Conference participants decide on what local service tools and recovery IPs to develop next. We are committed to completing the Spiritual Principle a Day book (www.na.org/spad) in the 2020–2022 Conference cycle, and we do not anticipate we will have the resources to fund any other in-person workgroups. That means we will use web meetings, focus groups, and virtual workgroups to develop smaller pieces such as IPs and service tools in the cycle ahead. With this approach in mind, we are planning to offer two general project plans in the Conference Approval Track material, one for IP development and one for local service tools. The specific focus of those two plans will be determined at the Conference using the survey results as a resource.

After the sections of the survey asking for your priorities on recovery literature, service material, and Issue Discussion Topics, we are including a section on the future of literature and service tools. We would like your input on some questions that will help shape Conference discussions on improving access to materials and implementing better processes to respond to Fellowship needs.

Recovery Literature

Unless otherwise directed by WSC 2020, we are planning to continue work on:

- the Spiritual Principle a Day (SPAD) meditation book (www.na.org/spad)



WSC 2018 passed this project with the intention that 2018–2020 would be the first of two cycles for the project. We will offer a project plan for the second cycle of the project in the Conference Approval Track material.

Selecting up to three of the options on the next page will help the WSC prioritize the focus of an IP project for the upcoming cycle, and it will help set possible priorities for future work/project plans. We also are asking for your input on what pieces of recovery literature you would prioritize for revision. Please select up to two pieces to revise. We will offer a project plan in the Conference Approval Track material to revise one IP per cycle, and your responses to this list will help Conference participants decide what to focus on in the cycle ahead.

We will collect responses from members until 1 April 2020, and we will compile those responses for the Conference to consider. You can access the survey at www.na.org/survey or from the link on the NA Meeting Search app. We also will ask regions and zones to submit their regional and zonal consciences by 16 April 2020, so that we can compile those to distribute as well.

New Recovery Literature (choose up to 3)**Literature to support Step work**

- ☐ Booklet of Step study questions taken from “How It Works” in the Basic Text
- ☐ Step working booklet focused mainly on Steps 1–3 aimed primarily at new members and those in treatment and drug courts
- ☐ Step working guide aimed at members not new to working the Steps

Literature exploring specific spiritual principles

- ☐ List and definition of spiritual principles
- ☐ The spiritual benefits of service
- ☐ Members’ experience, strength, and hope on trustworthiness and trusting the process
- ☐ Maintaining gratitude in early recovery

Create a new IP or booklet

- ☐ On doing a daily personal gratitude inventory
- ☐ On using social media in NA
- ☐ Personal stories about relationships and families in recovery
- ☐ Dealing with trauma/PTSD in recovery
- ☐ Atmosphere of recovery in service
- ☐ Dealing with grief in recovery
- ☐ What is Narcotics Anonymous? (for newcomers and visitors)
- ☐ Literature for atheists and agnostics
- ☐ What does it mean that NA is a spiritual, not religious, program?
- ☐ Literature for younger members
- ☐ Literature for older members
- ☐ Literature for experienced members/“oldtimers”
- ☐ Literature for LGBTQ+ members
- ☐ Literature for women in recovery
- ☐ Literature for First Nations/indigenous members
- ☐ Literature for members who are professionals
- ☐ Literature for members who are veterans

Other

- ☐ Other:
- ☐ No new recovery lit

Revisions to Existing Recovery Literature (choose up to 2)**Revise an existing piece of NA literature**

- ☐ Revise *The Narcotics Anonymous Step Working Guides*
- ☐ Revise the *Sponsorship* book
- ☐ Revise IP #21 *The Loner*
- ☐ Revise IP #6 *Recovery and Relapse*
- ☐ Revise IP #26 *Accessibility for Those with Additional Needs*
- ☐ Revise IP #7 *Am I an Addict?*
- ☐ Revise IP #20 *H&I Service and the NA Member*
- ☐ Revise IP #15 *PI and the NA Member*
- ☐ Revise *Twelve Concepts for NA Service*
- ☐ Review currently approved recovery literature to gender-neutralize NA literature where possible

Other

- ☐ Other:
- ☐ No revisions

Service Material

As with the recovery literature category, work is already underway on previously prioritized service material. We have been working on two service material project focuses since WSC 2016: Local Service Toolbox (www.na.org/toolbox) and Conventions and Events (www.na.org/conventions).

Unless otherwise directed by the WSC, we plan to continue developing pieces for a Conventions and Events Toolbox. So far, we have worked on three pieces—one piece on Program, one on Money Management, and a third on Contracts and Negotiations—which are meant to be part of the larger toolbox.

The Local Service Toolbox pieces that we have drafted, on the other hand, can function as stand-alone pieces. So far, we have finalized *CBDM Basics* and a piece on *Serving NA in Rural and Isolated Communities*. We are currently at work on “GSR Basics.” Most of the items below could easily fit into a Local Service Toolbox along with the two published pieces and the third currently in development.

Selecting up to four of the options below will help the WSC prioritize the focus of a service tools project for the upcoming cycle, and it may help set possible priorities for future work/project plans.

Service Material (choose up to 4)

Service materials to support individuals' efforts	Legal, financial, and Seventh Tradition tools
☐ Carrying the NA message effectively	☐ How we apply the principle of self-support in NA.
☐ How to be a trusted servant in NA	☐ Fund flow in the digital age
☐ Personal application of the Concepts and Traditions	☐ Fundraising—what is appropriate?
☐ Applying and working the Concepts	☐ Information for creating legal entities/incorporating
☐ Respect as a spiritual principle of service	☐ The <i>Fellowship Intellectual Property Trust (FIPT)</i> and local websites
Public relations	☐ Dealing with banks and government financial regulations
☐ Our public image: creating confidence in NA	☐ Dealing with misappropriation of NA funds
☐ More social media guidelines above and beyond the service pamphlet	☐ Area treasurers' and budgeting basics
☐ More short, focused PR resources such as tools to assist in reaching the medical community, criminal justice, and those who refer people to NA	Revise existing service material
☐ Sponsorship behind the walls basics	☐ Update <i>A Guide to Local Service in NA (GLS)</i>
NA Services 101	☐ Revise <i>Translation Basics</i>
☐ Online meetings best practices	☐ Revise and update <i>Planning Basics</i>
☐ Best practices for virtual service meetings	☐ Revise and update <i>PR Basics</i>
☐ The impact of technology on services and workloads	☐ Revise and update <i>H&I Basics</i>
☐ Best practices for service workshops	☐ Revise and update the service pamphlet <i>Disruptive and Violent Behavior</i> to reflect current practices in the Fellowship and include the issue of sexual predators
☐ Facilitation basics	☐ Revise and update the service pamphlet <i>Group Business Meetings</i> , with a section on using a CBDM process, and the concept of delegation
☐ Create a service pamphlet explaining what we mean by "under no surveillance at any time"	Other
☐ What is NA World Services and how does it work?	☐ Other:
☐ Fellowship development basics	☐ No new or revised service material
☐ Cooperation, not affiliation—our relationship to others, including AA	
☐ Collaboration among service bodies	
☐ When service bodies split or reunify	
☐ Description of service commitments at areas and regions	
☐ Effective report writing	
☐ Tools for mentorship, including as it relates to service bodies and new meetings	
☐ Group support forum, local service conference, and local service board basics	
☐ Policy in NA—different kinds of policy styles and approaches	

Issue Discussion Topics

The Issue Discussion Topics (www.na.org/idt) are just that—issues that are discussed throughout the Fellowship for the two years between Conferences. The results of those discussions can contain some of NA's best practices and have created the foundation for several service pamphlets (<https://www.na.org/?ID=servicesvc-pamphlets>) and other tools and literature, including the Building Strong Home Groups worksheet, service pamphlets such as *Principles and Leadership in NA Service* and *Disruptive and Violent Behavior*, the *Money Matters* IP, and more.

The 2018–2020 Issue Discussion Topics (IDTs) are:

- Attracting Members to Service
- Carrying the NA Message and Making NA Attractive
- Drug-Replacement Therapy (DRT) and Medication-Assisted Treatment (MAT) as It Relates to NA

For more information on those IDTs, see page 22 of this CAR.

Selecting up to four of the options to the right will help the WSC select Issue Discussion Topics for the upcoming 2020–2022 cycle.

Issue Discussion Topics (choose up to 4)

IDTs for 2020–2022 cycle

- ☐ DRT/MAT as it relates to NA—what do we want to say in a piece of NA literature?
- ☐ What it means to be self-supporting in NA
- ☐ The *Fellowship Intellectual Property Trust (FIPT)* and upcoming revisions
- ☐ Our Symbol—a closer look
- ☐ The importance of our Traditions to NA
- ☐ Group conscience and consensus-based decision making
- ☐ PR Basics—what they are and why they are important
- ☐ Simplicity and flexibility in service
- ☐ Empathy and respect in service—practicing spiritual principles
- ☐ Growing NA in established communities
- ☐ Social media and PR issues
- ☐ Dealing with disruptive and predatory behavior
- ☐ Making NA accessible for those with additional needs
- ☐ Getting youth and newcomers involved
- ☐ Becoming a better sponsor
- ☐ Creating community in NA
- ☐ Mentoring and learning in service
- ☐ Leadership in NA
- ☐ The integrity and effectiveness of our communications
- ☐ Eleventh Concept—NA funds are to be used to further our primary purpose and must be managed responsibly
- ☐ Building our unity while respecting our differences
- ☐ Retaining members in NA
- ☐ Illness/medication and our literature
- ☐ Using *Guiding Principles* to frame discussions on current issues/challenges

Other

- ☐ Other:



Future of Literature and Service Tools

The survey to set priorities for literature, service materials, and Issue Discussion Topics has become a regular feature of the *Conference Agenda Report*. In addition to that part of the survey, to help us prepare for WSC 2020 discussions, we would like to ask you some broader questions about literature.

⇒ **We are including these questions in the *CAR* to get a pulse to frame WSC discussions. This is input, *not* a decision. We will report the survey results to Conference participants and, after the World Service Conference, we will report on any related discussions and next steps.**

Several of the recent motions for Conference consideration have been about converting service pamphlets to informational pamphlets (IPs), and that has us thinking about our literature categories and our development processes.

A couple of concerns are driving the questions that follow. First, we want to be sure groups and members have access to the materials they want and need. Second, we would like to improve our ability to respond to Fellowship needs in a timely fashion and to update materials and remain current—this applies both to service materials and recovery literature.

Fellowship-Approved Recovery Literature Development Process

Our current process for NA Fellowship-approved recovery literature dates back to the 1970s and 80s. Over time and with experience we have adapted the process, and it seems to have improved. Technology has helped increase access and participation from members throughout our worldwide Fellowship who speak many languages. Our emphasis on collecting writing and ideas from members before we begin drafting material has led to books and pamphlets shaped by all interested

members regardless of the language they speak or where they live.

An idea for a new piece, such as “Mental Health in Recovery,” typically comes from the Fellowship, perhaps through input in the *CAR* survey. Once the World Service Conference has prioritized an item for recovery literature, a survey is created to gather ideas from the Fellowship on what they want (and do not want) the piece to say. With “Mental Health in Recovery,” the idea for a new IP was discussed and approved at WSC 2016, a survey was conducted in 2016–2017, and the results of that survey shaped the plan for the creation of the IP that was presented to and approved at WSC 2018. The survey was completed by members in 48 US states and 27 other countries in a variety of languages. We received over 1,500 pieces of input, and that input created a clear road map for what the draft pamphlet would say. This up-front input for literature projects has provided clear direction and allowed participation by a more diverse range of members in their native language.

After approval at WSC 2018, a workgroup was formed, and a draft was created based on the Fellowship input received. That draft was reviewed by the workgroup and the Board. Then what is called a review and input draft was posted online for over 100 days in 2019. Again, as with the initial survey, any interested member of the Fellowship could submit input. The input received—approximately 500 pieces from 16 countries—was used to revise and shorten the pamphlet, and what is called the approval draft is presented in this *CAR* for approval.

These are the basic steps we go through to create each new piece of recovery literature. We strive to bring all interested members into the process and capture the voice of the Fellowship as a whole. As we stated, we believe this process has improved over time and works well. This survey is not motivated by a desire to revise or change the development or approval process for NA Fellowship-approved recovery literature. We believe materials that speak to members about their personal recovery as well as materials that establish fundamental NA philosophy should go through this rather long and involved but invaluable process.

How We Categorize Our Material

Our challenges today are more about how pieces are designated—whether as recovery literature or as service material—and how we become more efficient and more nimble at creating new materials that the Fellowship requests, revising material that is outdated, and ensuring that members and groups have access to the materials that have been created for them.

Prior to the 2000 World Service Conference, all material was subject to the same approval process. When the designations for recovery and service materials were first created, the Fellowship was primarily English-speaking and service material was primarily large handbooks. No systematic effort was made to review the classification of already published materials, particularly IPs. Instead, all IPs were designated Fellowship-approved material. We have provided a list of our current recovery literature and service materials in Addendum F of this CAR to help you understand where we are today. This table includes all of the items we publish, the date they were originally published to the best of our knowledge, the last revision date, how they are categorized, and what languages they are currently published in. We hope that you take the time to review it and hope this information is as interesting to you as it has been to us. It's worth noting that our record keeping has gotten much better over the years, and the data here is the best we have been able to put together from our files. If you note an error, let us know.

Currently, we have three basic categories of literature and service materials: Fellowship-approved, Conference-approved, and World Board-approved. These approval processes are explained in detail on pages 41–44 of *A Guide to World Services in NA*. In brief, Fellowship-approved material must be sent out to the Fellowship for review and input and included in the *Conference Agenda Report* for approval by the Fellowship. Conference-approved material may or may not have a review and input period depending on the project plan and can be included in either the *Conference Agenda Report* or Conference Approval Track material for approval. Board-approved material is sent

to Conference participants for a 90-day review period before being approved by the Board.

There are several current Fellowship-approved recovery IPs that we do not believe would be developed as recovery literature IPs today. Should items like IP #20 *H&I Service and the NA Member*, IP #15 *PI and the NA Member*, or IP #26 *Accessibility for Those with Additional Needs* actually be considered recovery literature, or are they more like tools to help members understand the importance of these services and issues? These three pieces are pretty dated and might never be prioritized to be updated as recovery literature IPs.

A few other pieces that are designated as Fellowship-approved are not necessarily considered recovery literature. *The Group Booklet* and *Twelve Concepts for NA Service* are both Fellowship-approved, and both followed the recovery literature process for approval. They both contain text that establishes fundamental NA philosophy and policies, and we believe only the Fellowship as a whole can approve this kind of fundamental philosophical piece. Most other service-related materials simply attempt to convey how to apply our principles in our service efforts and contain the Fellowship's best practices.

The first question in the survey that follows is related to what we categorize as Fellowship-approved material:

Should Fellowship-approved material be limited to items that address personal recovery and/or establish fundamental NA philosophy and policies? Currently, Fellowship-approved material includes some items that are addressed to members but are not directly about personal recovery, such as IP #15 *PI and the NA Member* and IP #20 *H&I Service and the NA Member*, as well as items that are addressed to groups or service bodies, such as IP #2 *The Group* and IP #26 *Accessibility for Those with Additional Needs*.

Tools for Members and Groups

Over the last twenty years, the process for developing and approving service material and tools has continued to change and adapt to meet

our members' needs, expectations, and use. The World Board approval process has been a successful way to meet needs more quickly while remaining responsive to members' input. We post materials online in all stages of development and provide at least 90 days' notice for review and input of drafts before they are considered approved. That process has seemed to work well and has led to increased demand and decreased controversy.

Members continue to ask for smaller, easier-to-digest pieces that speak to specific needs and service experience. We began responding to these requests with the creation of service pamphlets (SPs) in 2007. The interest in and need for these materials are clear from the number of language groups that choose to translate them (see Addendum F) and by the number of copies that we distribute and that are downloaded from www.na.org. Since the creation of SPs, one has been adapted to a Fellowship-approved IP. IP #29, *An Introduction to NA Meetings*, was initially created as a service pamphlet intended for professionals who refer members to NA. In response to a regional motion, it was revised through the Fellowship approval process to become a Fellowship-approved recovery literature IP speaking directly to new members or potential members.

Updating Service Pamphlets and IPs

We have received several requests this cycle to update the SP *Disruptive and Violent Behavior*, which has been translated into 17 languages. It is already almost 13 years old, and the requests ask that the pamphlet be revised to more directly address issues such as sexual harassment and to reflect more current Fellowship best practices in dealing with disruptive members. The World Board approval process, with delegate review, makes such a revision relatively easy to do.

We believe a number of outdated recovery IPs also need to be revised at some point soon, but they are definitely recovery literature, in our perception, because they speak to a member's recovery. They include, but are not limited to, IP #21 *The Loner* and IP #23 *Staying Clean on the Outside*. Neither IP has been revised or updated for over 30 years, and the world has changed

tremendously since they were written. *The Loner* was written before the internet or online meetings and refers to resources that no longer exist. We will ask for approval at WSC 2020 to begin the process to update at least one IP of this type each Conference cycle.

If the WSC agrees to revising at least one IP each cycle, Conference participants will use survey responses to help prioritize what to focus on first. After the WSC, we will announce what IP we are planning to update and ask all interested members to give input for revisions as we do when undertaking any recovery literature project.

The second question in the survey that follows is related to updating IPs:

Do you support updating at least one IP per Conference cycle?

Improving Accessibility to Service Pamphlets

Along with the requests to update a service pamphlet, in 2018 there was another CAR motion to convert a service pamphlet to an IP. Part of the region's rationale for the motion was that the pamphlet wasn't available for group use: "In keeping with our long-standing practice of only using Fellowship-approved material in NA group meetings, it would only make sense to have this valuable resource available to groups." When we looked at these requests related to service pamphlets, we realized that although service pamphlets and other tools have been developed primarily for group use, they are rarely seen on a group literature table. We are not entirely clear why that is, and we are posing questions to you to try to determine why. The 2018 motion, to create a project plan to change the current SP on social media to an IP, was adopted at WSC 2018. We assume the motivation to change the approval process and category for this pamphlet is primarily so that members will have greater access to it. We have heard no objections to the content of the current SP; the issue seems to be accessibility. But we are not sure this is the best way to go about increasing access to a service pamphlet.

Issues related to social media are ever changing, and the approval process for SPs allows us to update material quickly with oversight by the Conference. We have concerns about creating a Fellowship-approved IP on a topic that is so fast moving because our current practices with IPs mean it would not be updated. Creating a Fellowship-approved IP about social media also seems to further confuse the issue of what is recovery literature and what is meant as a tool for members or service bodies to use when interacting with the public.

Service pamphlets state on the cover that they are not intended to be read during a recovery meeting. This seems to affect groups' decisions about having them available on a group literature table or rack. Though service pamphlets are available for download from www.na.org, a group literature table is the only place that many members would ever be exposed to these tools. While *The Group Booklet* clearly states that only NA-approved literature should be read in an NA meeting, it also states, "Groups often make other kinds of NA publications available on the literature tables at their meetings: various NA service bulletins and handbooks, *The NA Way Magazine*, and local NA newsletters."

We are interested in finding ways to continue to gather Fellowship experience and best practices for groups and service efforts and how to best provide these resources or tools so that our members know they exist.

The third question in the survey asks for your thoughts on how to improve accessibility to service pamphlets:

A relatively small number of groups stock service pamphlets or group-related tools. Do you believe this is due to: (choose all that apply)

- ☐ Cost
- ☐ Awareness
- ☐ Fitting into a literature rack
- ☐ The designation on the front cover that these are not to be read in a meeting
- ☐ Other:

Improving Accessibility to Other Service Materials

We have similar accessibility challenges with other tools intended for groups. Our current Local Service Toolbox Project has helped us create tools more quickly and involve any interested member in the process. The project is currently working on "GSR Basics" and has completed materials for *Serving NA in Rural and Isolated Communities* and *CBDM Basics*. You can find more information about that project at www.na.org/toolbox. We have received positive feedback from members who have used these tools, but we struggle to inform members that these resources exist and how and where to access them.

Other than *A Guide to World Services in NA* (GWSNA), which is revised each Conference cycle, our most current handbook is the *PR Handbook*, approved and published in 2006. Since that time, we have developed *PR Basics* through the World Board approval process, and we distribute almost eight times as many paper copies of *PR Basics* as we do the *PR Handbook*. In fiscal year 2019, we distributed 305 *PR Handbooks* and 2,315 *PR Basics* from our Chatsworth office. And that does not take into account the number of *PR Basics* that are downloaded from the website.

These shorter, easier-to-digest, easier-to-translate pieces seem to be the clear Fellowship preference. We are currently looking at ways to package some of these shorter, more current resources so that they are more accessible. We are planning to include them as addenda to *A Guide to Local Services in NA* (GLS), and we have talked about possibly creating apps and other ideas to make it easier for members, groups, and service bodies to find and use the materials they need. (For a complete list of all service tools, including handbooks, basics, and more, see the List of Published Materials in Addendum F.)

The fourth question in the survey that follows asks you about improving accessibility to materials:

What other ideas do you have for getting approved service materials to groups and members more easily?

Getting Caught Up

We hope to be able to use some of what we have learned from the Local Service Toolbox Project and the Board approval process to develop, review, and have approved tools for groups, areas, regions, and zones that we can eventually compile to revise *A Guide to Local Service in NA*. We do not have a successful history of looking at revisions to the entire service system at one time, and this incremental approach seems more realistic to us.

If we are ever to “catch up,” we need to be able to update materials more easily and make them available in a way that members can readily access. At some point in the future, we would like to redesign the look of our IPs and tools, but the blurry line between tools and recovery literature makes this more difficult. Until we know your thoughts about how to categorize literature and tools and make sure they are as accessible as possible, a redesign seems premature. We want the look and packaging of materials to be more obvious to newer members or those new to service, and we want it to reflect members’ vision of how these materials should be used. Don’t worry; this is an idea for the future, and we won’t do anything without asking for your input and providing a lot of notice.

If you’re new to NA service or unfamiliar with our literature and service material processes, some of these issues may seem a bit confusing. Please don’t hesitate to email worldboard@na.org if you have any questions.

Again, the purpose of this survey is to gather your ideas about topics we intend to discuss at WSC 2020. We are not attempting to change the Fellowship approval process for recovery literature, but we would like to continue to improve access and perhaps clarify the ways we categorize some materials. Our goal is to have more useful, current materials that reflect the Fellowship’s best practices.

We will be collecting responses from members until 1 April 2020, and we will compile those responses for the Conference to consider. You can access the survey at www.na.org/survey or from the link on the NA Meeting Search app. We will also ask regions and zones to submit their regional and zonal consciences by 16 April 2020 so that we can compile those to distribute as well.

Questions to help frame WSC discussions

1. Should Fellowship-approved material be limited to items that address personal recovery and/or establish fundamental NA philosophy and policies? Currently, Fellowship-approved material includes some items that are addressed to members but are not directly about personal recovery, such as IP #15 *PI and the NA Member* and IP #20 *H&I Service and the NA Member*, as well as items that are addressed to groups or service bodies, such as IP #2 *The Group* and IP #26 *Accessibility for Those with Additional Needs*.
2. Do you support updating at least one IP per Conference cycle?
3. A relatively small number of groups stock service pamphlets or group-related tools. Do you believe this is due to: (choose all that apply)
 - ☐ Cost
 - ☐ Awareness
 - ☐ Fitting into a literature rack
 - ☐ The designation on the front cover that these are not to be read in a meeting
 - ☐ Other:
4. What other ideas do you have for getting approved service materials to groups and members more easily?

Preparing for WSC 2020

Thousands of copies of the CAR are circulated before each WSC. We distributed over 3,200 copies and there were more than 23,000 download sessions of the 2018 CAR. All NA members are able to participate in discussing and deciding on the content of the CAR. Regions—and now zones—approach collecting a conscience in a variety of ways. Some tally group votes; some tally area votes; some gather every interested member and count individual votes. If you aren't sure how it's done in your region or zone, ask a local member who has service experience or contact NA World Services and we will connect you with your delegate.

Much of the information in this section of the CAR may be most relevant to Conference participants. In the following pages, we will review some of the things that happen at each Conference and some of the innovations for WSC 2020. We also will list some important deadlines and give a brief overview of what will be included in the Conference Approval Track material and the *Conference Report*.

Sessions That Are at Each WSC—What They Are and Why

Though the World Service Conference is ever evolving, all WSCs have some elements in common. The Conference opens with sessions to welcome participants and build community. Last cycle we scheduled WSC orientation via web meeting before the Conference began, and we plan to do the same this cycle. That frees us up to move into CAR-related discussion and decisions earlier. As we mention repeatedly in this CAR, World Services uses a strategic plan to help focus our work. The Conference marks the end of one planning cycle and the beginning of the next. The CAR often includes work from the closing cycle for the Fellowship to approve—in this case, the “Mental Health in Recovery” IP and the recommendations from the FIPT workgroup.

Throughout the week there will be presentations, discussions in small groups, and decision-making sessions. Toward the end of the week, participants will make decisions about the bud-



get and project plans for the cycle ahead. At this WSC, participants will be asked for the first time to approve the strategic plan. Participants will also begin to frame the strategic plan for the following cycle (2022–2024) as well.

We plan to devote time for Conference participants to prioritize and discuss issues of their choosing, as we did at WSC 2018. This is still a new process for us, and we will have more information about new idea proposal discussions in the *Conference Report*.

Here is some of what we know will take place during WSC 2020:

- A welcome session with introductions
- Public relations and Fellowship development presentations for the activity of the last two years
- Reports from World Services and the Human Resource Panel (HRP)
- A presentation of proposed budget and project plans for the cycle ahead
- CAR- and CAT-related discussion and decisions
- A session devoted to delegates sharing with delegates, planned by delegates
- Time and space for zones to meet if they wish
- Elections for World Board, HRP, and WSC Cofacilitators
- Discussions of prioritized new ideas submitted at the WSC
- Wrap-up session reviewing the work ahead and making any needed decisions

We are still early in the planning process, and this list is not complete. The *Conference Report*, which will be released shortly before the WSC, will lay out the Conference week in detail.

Innovations for WSC 2020

At this WSC, there will be zonal delegates (ZDs) from zones with two or more unseated regions. As a result of decisions at WSC 2018, these ZDs are Conference participants with the same voting and participation rights as regional delegates (except for *Fellowship Intellectual Property Trust* decisions; see the *FIPT* essay beginning on page 12 for more information.)

We are offering a reporting form specifically geared toward zones for the first time. The information from this form will be used to populate a new tool, a collection of Zonal Snapshots that we hope to have available for distribution with the *Conference Report*.

A number of the changes at the upcoming Conference are coming from the Human Resource Panel. Election ballots will be electronic for the first time. This is similar to the system we now use for electronic voting; each participant will have a unique link, but the balloting results will be anonymous.

We would like to use the same eballoting system to take an initial straw poll on all of the CAR motions and amendments. The WSC Cofacilitators suggested this so that participants can get a sense of the initial support for each measure before the CAR-Related Discussion and Decisions session begins. This will help the Cofacilitators when they determine the order of business, and it will help participants decide where to focus energy and efforts.



risers at the WSC

Part of what makes it possible to straw poll all CAR-related decisions in advance of the session is the new deadline established by participants at WSC 2018. One of the biggest changes at this WSC is that all motions for seating and amendments to motions need to be submitted ten days before the WSC, no later than 16 April 2020. The HRP is recommending that nominations from Conference participants be submitted by this deadline as well.

These deadlines will help us compile motion lists and include them with registration packages so that participants will receive them when they arrive on-site. The HRP will be able to put together eballots early as well. All of these early preparations should help us make our decisions more efficiently and spend more time in WSC discussions.

Delegate Preparations for WSC 2020

Preparing for the World Service Conference is a huge job. Delegates and alternates must not only read the *CAR*, *CAT*, *Annual Report*, and *Conference Report*; they must be able to explain the issues to others and gather the conscience of their regions and zones.

If you are a new Conference participant, we encourage you to reach out to more experienced members. If you are partnered with a more experienced delegate or alternate, they can help mentor you through “Conference season.” If you attend a zonal meeting, ask the other delegates about their experiences and get numbers so you can call with questions. And don’t forget: You can always email the World Board at worldboard@na.org.

Here are some Conference participant responsibilities that need to be done before the WSC:

- **Register for the WSC and make travel arrangements:** We mailed a travel and rooming memo to Conference participants along with the *Conference Agenda Report*. The memo is also posted on www.na.org/conference. This memo explains how to register for the Conference and how to make hotel and flight reservations. You must fill out the form for hotel and WSC registration by

1 March 2020, and you must book your flight by 15 March 2020. Participants who cannot obtain a visa will be connected to the WSC via the internet. We tried this for the first time at the last WSC, and it worked well. Please contact us as soon as possible if you cannot obtain a visa.

- **Regional and zonal reports:** The deadline for regional and zonal reports is 15 February 2020. We also included a regional report form with the CAR mailing to Conference participants, and the form is posted at www.na.org/conference. We will work directly with zonal delegates and contacts on the zonal reports so that we can be sure to get the data needed for the Zonal Snapshots tool. Regional and zonal reports paint the most complete picture of NA service efforts worldwide that we know of. For the past several Conferences, almost all seated regions have submitted their reports by the deadline, which is great! The information helps us to shape WSC sessions, and it serves as a historical record for the future. The reports we receive by the deadline are summarized and printed in their entirety in the *Conference Report* and posted online at www.na.org/conference.
- **CAR survey:** Members can fill out the CAR survey any time until 1 April 2020. The survey is posted online at www.na.org/survey and available from a link on the NA Meeting Search app. We also will post a version of the survey form to collect regional and zonal responses. Once the form is posted, we will email Conference participants with the link to enter their regional and zonal consciences before 16 April 2020.
- **WSC topics survey:** We typically survey participants to ask what you want to discuss at the Conference. Again, we will email you when the survey is posted.
- **WSC orientation:** In 2018, we scheduled the WSC orientation in advance of the Conference for the first time, and it seemed to work well. We will once again devote a Conference participant web meeting to orientation. The orientation will be 28 March 2020, and we will record it and make it available to those who cannot attend.

Important Deadlines

15 February 2020: Regional and zonal reports, material from Conference participants for the *Conference Report*

1 March 2020: Register for the WSC

15 March 2020: Flight arrangements for the WSC

1 April 2020: *CAR* survey responses from members

16 April 2020: Amendments to *CAR* motions, seating motions, *CAR* survey results from regions and zones. If possible, submit nominations from Conference participants by this date.

At the WSC—new idea proposals will be submitted at the WSC itself.

Conference Mailings

The *Conference Agenda Report* is the first of three main Conference mailings. The Conference Approval Track mailing is the second and the *Conference Report* is the third.

Conference Approval Track Material

The Conference Approval Track material comes out 90 days before the WSC. The CAT always contains the budget and project plans proposed for the upcoming cycle, the NAWS Strategic Plan, and requests for WSC seating from regions, along with the Seating Workgroup recommendations and a report from the World Board.

We also are including a copy of *A Guide to World Services in NA* (GWSNA) with revisions we are proposing to reflect current practices. Some of these proposed changes have come from the HRP, some originated from the WSC of the Future Workgroup, and some came from Board discussions.

Some of the changes proposed for GWSNA include:

- A definition of Conference participant (CP) that includes zones. For the purposes of decision making, that means zonal delegates or alternates; during the Conference cycle, for the purposes of communication and discussion, that includes zonal contacts as well. We are proposing an update to the text to reflect that expanded understanding of CPs.
- A description of current election policies in response to the motion passed at WSC 2018: “To acknowledge that the WSC has moved away from distributing and collecting election ballots by roll call. The replacement language for the current policies will be presented to participants in the 2020 CAT.”
- A more thorough revision of the WSC decision-making processes section (formerly titled WSC Rules of Order) to reflect current policy and practice.
- A description of the WSC that reflects that it is more than just the biennial, face-to-face meeting. The work of the WSC occurs throughout the two-year cycle and includes Conference participant web meetings and other forms of communication to forward discussions and build consensus on topics that concern NA as a whole.

We did not include a description of the new idea proposal process with the proposed changes to GWSNA. We tried that process for the first time in 2018, and we have heard from most participants that they believed it to be a big improvement over the new business sessions from the past. We do believe that we could do a better job of giving support and information about how to frame an idea proposal for discussion and communicating realistic expectations of outcomes. We think it’s wise to try the new idea proposal discussion process again at WSC 2020 before attempting to codify it in *A Guide to World Services in NA*.

The CAT will be available no later than 26 January 2020. We will mail copies to Conference participants and post the draft at www.na.org/conference.

Conference Report

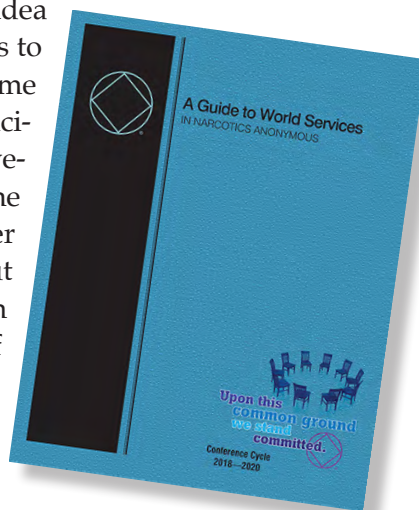
The third big report before the WSC is the *Conference Report* (CR). We mail and post the *Conference Report* not long before the WSC. The *Conference Report* is a great, day-by-day, session-by-session walk-through of the week—as much as we know at the time of publication. The CR includes information participants will need for the WSC discussions and decisions, including what we have heard since publishing the *Conference Agenda Report*.

Conference participants can submit material to be published with the *Conference Report*. The deadline is 15 February 2020.

The CR also includes a summary of the regional reports. The regional reports are compiled and posted at www.na.org/conference. And this time, we hope to mail a copy of the Zonal Snapshots along with the CR as well.

We include summaries of several types of cycle activity within the CR: a report of all World Services travel since the previous Conference, the status of all project ideas submitted in the course of the cycle, and all of the new products and literature published in the cycle.

Again, we know it’s a lot to read and absorb. Reach out to us if we can help in any way. Thank you for your service!



Regional Motions

In the 2018 *Conference Agenda Report*, we tried something new: We categorized the regional motions by topic and provided information and links to resources to introduce those topics where it seemed helpful to do so. That appeared to help members as they workshopped the motions, so we are taking the same approach in this CAR.

We appreciate that there are only eleven regional motions in this *Conference Agenda Report*, fewer than half the number in the 2018 CAR. Twenty-five motions were submitted by the 1 August deadline. Twelve of those were withdrawn, and two did not make the 30 August deadline to be in final CAR-ready form despite a deadline extension of over a week.

We often are asked, “What does CAR-ready mean?” The simplest explanation is on pages 18 and 19 of *A Guide to World Services in NA*. After a Conference participant submits a draft motion for the CAR, the Board gets in touch with the participant to help them through the process of getting the motion in final form for the CAR and to let them know if another participant has submitted a similar motion. In some cases, participants may decide to work together on one motion rather than submit two similar motions. Often, a discussion with the Board can bring about a resolution, as it did with examples described below, without having to resort to a motion. You don’t have to wait until the August before the WSC and draft a motion to communicate your concerns! We encourage you to express your ideas and concerns to the Board throughout the cycle, not just in “Conference season.”

Some makers chose to withdraw their motions because after discussing the issue with the Board, a resolution was reached. For instance, one motion addressed spelling errors in a translated text. Another asked for revisions to a service pamphlet to update the content. These sorts of issues can be resolved without using a motion. World Services can correct errors in translated texts when they are brought to our attention, and service pamphlets can be updated as needed. The nice thing about the Board-approval process

is that a motion is not required in order to look at revisions to these pieces. These pieces can be revised at any time, and they are posted for a 90-day review



so that Conference participants can see the proposed changes and give input before the revision is finalized. We have included the proposed ideas about revising the service pamphlets in the current CAR survey that begins on page 24.

Most of the regional motions in this CAR call for a project plan of some kind to be drafted for consideration at WSC 2022. The challenge is that motions to create project plans are considered independently of each other and outside of the full range of work for the cycle. In this case, the cycle would be the 2022–2024 cycle. Currently, we have two independent streams that lead to project creation: the NAWS Strategic Plan and regional motions. We have to figure out how to unify these streams of ideas and consider all of the potential work together so we can make responsible and realistic decisions.

We recognize the dilemma. We are trying to create a more collaborative approach to NAWS strategic planning so that we can look at all of the potential work side by side. But until we get to that point, the CAR may seem like the only place to get an idea considered. Conference participants may feel they have no other mechanisms to introduce their ideas before the WSC. We understand that, and we hope some of the changes we’re making this cycle will help in the future.

For now, however, because we have projects being suggested by regional and zonal motions and projects springing from the NAWS Strategic Plan, there may be far more projects presented at WSC 2022 than we believe we can accomplish in a timely manner. It used to be our practice to draft more project plans than we knew we could work on in a given cycle, but in recent cycles we have tried to limit the number of projects proposed to reflect what we believe we can accomplish in the cycle. However, there are eight project plans potentially mandated by the motions that follow, and the NAWS strategic planning process and

environmental scan will lead to other projects we see as critical to undertake in the cycles ahead. So we seem to be, once again, in a place where we may draft and present more project plans than we can reasonably expect to work on in a given cycle. In the upcoming 2020–2022 cycle, we are planning for only one in-person workgroup because of financial considerations. We have been doing more with less by utilizing virtual workgroups and web meetings, but we are still limited in the number of projects we can coordinate in a given cycle. If the Conference approves more project plans or motions than we have the ability to complete, we will ask for your help in prioritizing them.

We are making efforts to create a more inclusive planning process, and hopefully this won't be an issue in the future. One thing we are trying, as we explain earlier in this *CAR*, is to use the *CAR* survey to look at all of the ideas for IPs and smaller service pieces next to each other. Fel-

lowship responses to the survey will help Conference participants make decisions about how to prioritize the work so that World Services can tackle the highest priorities first.

Another first for us is that at this Conference participants will begin laying the groundwork—together—for the 2022–2024 NAWS Strategic Plan. Our goal is to continue evolving the planning process until it becomes not just the Board's plan and process, but a plan that all Conference participants have helped create. We aspire to a planning process that is collaborative and that allows everyone's ideas to be heard—a process that allows us to make decisions together as a Conference about the priorities for the cycle ahead. In the meantime, however, we will need to figure out a way to consider all of the work being proposed for the 2022–2024 cycle holistically, so that we can undertake those projects the WSC considers a priority.

BOOK- LENGTH RECOVERY LITERATURE

Some background information and links related to this topic can be found below. These may be helpful when considering some of the motions related to book-length recovery literature.

The essay on strategic planning on page 6 of this *Conference Agenda Report* explains how project plans are created through our strategic planning process and our efforts to make this process more collaborative and inclusive.

The survey in this *CAR* on page 24 includes a number of ideas for recovery literature for members to prioritize. Using the survey to guide decisions about literature priorities allows the Fellowship and the Conference to consider ideas in relation to each other and establish priorities. The *CAR* survey seems to be the best mechanism to guide the WSC prioritization of projects because the survey includes all of the ideas for recovery literature and service tools that have been offered by Conference participants. We are supportive of whatever the Fellowship chooses as a priority.

Motion 6 To direct the WB to create a project plan for WSC 2022 to create a new Step Working Guide for members whom have worked through the previous one and would like to evolve in their recovery.

Intent: To develop new literature for members to continue their recovery process by working the Twelve Steps, in order to grow and pass it on to others.

Maker: Norway Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: The fellowship is 60 years old. Oldtimers and others who have been through the steps many times may want a fresh look at the steps since working the steps is an ongoing process, regardless of clean time. It is important that members are inspired to keep on passing a message of recovery for the addicts following in their steps. It is a fact that many members with long

clean time leave our fellowship. A new Step Guide may inspire oldtimers to stay in the fellowship. This is a 12 Step Program, and we should keep our focus on how we can best continue facilitating the growth and evolvement of our Fellowship, and the Literature is a very good way to do this.

World Board Response: We are in favor of work that supports the growth of the Fellowship and NA members' personal recovery. Our program is about the Twelve Steps, and material that encourages members to work the Steps cannot be a bad thing.

The challenge is that this is not the only book-length piece about working the Steps in this *Conference Agenda Report*, and as we mention in the introduction to the regional motions, one of the drawbacks to creating project plans through regional motions is that the ideas in the motions are considered independently of each other.

For an explanation of our approach to prioritization, see our remarks in the survey introduction on page 24 and the introduction to the book-length recovery literature motions on page 38.

Policy Affected: None.

Motion 7 To direct the World Board to develop a project plan, for consideration at WSC-2022, to create a booklet of Step study questions with the parameter that each question is derived from one sentence in the Basic Text chapter 'How It works'.

Intent: To create a fellowship approved, inexpensive, NA Step study questions booklet that relates directly back to the Basic Text.

Maker: Baja Son Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWs would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: The need is for elemental non-personal NA Step study material that can be read one-on-one, in NA group meetings, in institutions and in Behind The Walls correspondence. When the answers to study questions are the sentences in NA literature then issues of personality, ego, politics, religion and other affiliations are removed. The answer is always the original line in the Basic Text from which the question was created. With a booklet of Basic Text Step study questions and the Introductory Guide, it is possible to teach and/or study the NA program for about \$3 USD. We believe we are identifying a need not generally understood in the first world English speaking part of our Fellowship. Instead of asking for donations, we are requesting your support for the tools we need to succeed. The result of this motion would be a stapled booklet about the size of the Group Booklet. The NA Introductory Guide combined with Basic Text Step Study Questions is an inexpensive way to bring the NA program into both the incarceration and addiction rehabilitation environments. A first time through the Steps with the Basic Text provides a strong foundation for all members and facilitates future study with other NA literature. The Basic Text is uncomplicated, heartfelt NA recovery literature which addicts can identify with and embrace. This piece would logically be translated after the NA Intro Guide and before the book length Basic Text, reducing the development time for emerging fellowships to be able to study the NA program.

World Board Response: As we expressed in the previous motion, we are enthusiastic about tools that will encourage members to work the Steps, but considering each idea independently of the others doesn't give a sense of prioritization and doesn't allow the ideas to be part of an overall planning and budgeting process. This idea, as well as another idea for a Step working guide for new members and those in treatment or incarcerated, are both part of the survey in this CAR. For an explanation of our approach to prioritization, see our remarks in the survey introduction on page 24 and the introduction to the book-length recovery literature motions on page 38.

If the WSC prioritized a simple Step working guide aimed toward newcomers, we would frame a project plan, but we would use the same approach to create the guide that we do whenever we create a piece of literature. We would ask the Fellowship what they would like to see in such a guide, and we would use their input to guide the work. We would put together a draft that reflects what we heard from members, and then we would again ask the Fellowship for input on that draft.

We cannot commit to a project that predetermines the outcome of the work before seeking input from all interested members. The rationale of this particular motion is, therefore, not something we could accomplish. It's contrary to the literature process to mandate the content, creation process, and format of a text before a project even begins. We could begin with the idea described in this motion, but the process of creating NA literature is inclusive and dynamic; it's not entirely possible to predict the result of our worldwide collective efforts.

Policy Affected: None.

IPS AND SERVICE TOOLS

The introduction to the survey in this *CAR* (page 24) explains the approach we are taking this cycle to IP and service tool projects. We will offer a general project plan for service tools and one for IPs. (Project plans are included in the Conference Approval Track material.) The Conference will determine the specific focus of these two project plans by prioritizing a list of service tools and a list of IPs, with the results of the *CAR* survey helping to guide their decisions. Each of the ideas specified in the four motions that follow, Motions 8–11, is included in the lists of IPs and service tools in the *CAR* survey.

Using the survey to guide decisions about what IPs and service materials will be worked on allows the Fellowship and the Conference to consider ideas in relation to each other and establish priorities. The *CAR* survey seems to be the best mechanism to guide the WSC prioritization of projects because the survey includes all of the ideas for recovery literature and service tools that have been offered by Conference participants. We are supportive of whatever the Fellowship chooses as a priority.

Motion 8 To direct the World Board to create a project plan for the World Service Conference (WSC) 2022, the development of a new IP for daily personal inventory of gratitude.

Intent: To create a new resource for the fellowship members, through a new IP for the daily personal inventory of gratitude.

Maker: Argentina Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: A new IP brochure is a tool for the members of the Fellowship that inspires us to make a daily personal gratitude inventory, that promotes actions inspired by the spiritual awakening of the Twelfth Step of NA that encourages us to express our gratitude during the Just for Today and / or daily basis.

Members - at any stage of our personal recovery process that we find ourselves - can be inspired by questions about this spiritual principle, with direct actions of gratitude and / or gratitude list among others, and try to express growth in recovery through gratitude.

World Board Response: We are supportive of whatever the Fellowship chooses as a priority. For an explanation of our approach to prioritization, see our remarks in the introduction to the IPs and service tools motions above.

Policy Affected: None.

Motion 9 To direct the World Board to create a project plan for WSC 2022 to create a new IP for women in recovery.

Intent: To create a new resource for women in recovery.

Maker: Iran Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWs would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: Women in many parts of the world, including Iran, face challenges when seeking recovery in NA. In many NA communities there is not a lot of access to other recovering women. There is a tremendous amount of experience in NA with these challenges that could be shared in an IP. These include cultural barriers for women, sponsorship, attending meetings when you have small children, lack of personal resources, etc. This IP could provide new women with other women's experience in resolving these challenges.

World Board Response: We are supportive of whatever the Fellowship chooses as a priority. For an explanation of our approach to prioritization, see our remarks in the introduction to the IPs and service tools motions on page 40.

Policy Affected: None.

Motion 10 To direct the World Board to create a project plan for consideration at WSC 2022 to create a guide for online meetings.

Intent: To create a new resource.

Maker: Latin American Zonal Forum

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWs would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Zone: Up this date those meeting are considered tools of our fellowship. To create a guide for the online meetings for them to be able to meet the requirements to be integral part of our service structure in harmony with our fifth and eighth service concepts as well as our seventh tradition among other, to ensure they work NA way.

World Board Response: This is a topic we have attempted to forward since it was discussed at WSC 2018. We have held an open webinar to collect ideas and experience, and we plan to hold another after the WSC. We are attempting to gather the Fellowship's best practices with online recovery meetings. There is certainly interest and enthusiasm about this topic, and we plan to continue gathering recommendations for further discussion at WSC 2020.

Because this topic was identified for discussion at the last WSC, and this is part of an ongoing focus, if this is prioritized at WSC 2020, it would mean work would begin in this cycle rather than the next. For an explanation of our approach to prioritization, see our remarks in the introduction to the IPs and service tools motions on page 40.

Policy Affected: None.

Motion 11 To direct the World Board to create a project plan for WSC 2022 for a service pamphlet (SP) that explains “being under no surveillance at any time”.

Intent: To create an SP regarding “we are under no surveillance at any time” will help to clarify the confusion that members may experience when they see surveillance cameras in facilities where NA meetings are held.

Maker: Carolina Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: Many facilities have sophisticated security systems, sometimes even inside a room where an NA group meets. Their purpose is to catch a burglar or a serious problem such as an active shooter where a video record would assist the police later in an investigation. However, with technological advances and with the ever increasing amount of cameras and high-tech security systems it is leading to a huge confusion within the groups and areas. What do we tell our members, especially newcomers, who may encounter cameras in the rooms as we read aloud our statement about “being under no surveillance at any time?”

Now, some of our members do not want to attend the facilities with cameras or some are trying to cover the cameras, this is damaging the relationships with the facilities as well as causing disunity in the areas and groups. The groups/areas are suffering as well as the members, Clarification is desperately needed.

We believe that a new SP clarifying the difference between being monitored by a security system for everyone’s safety, and the state of being under surveillance may help in a situation where the facility has cameras set up on a permanent basis.

World Board Response: This is certainly an old issue that has caused confusion among many members. NA only speaks for itself, so any surveillance we refer to can only be about NA. We have no control over outside entities. Service pamphlets do not require Conference action in order to be developed, but given our finite resources, we are asking the Conference to choose the items we focus on in the upcoming cycle.

For an explanation of our approach to prioritization, see our remarks in the introduction to the IPs and service tools motions on page 40.

Policy Affected: None.

LITERATURE DEVELOPMENT AND TRANSLATIONS

Some background information and links related to this topic can be found below. These may be helpful when considering some of the motions related to literature development and translations.

Translation Basics is a resource for local translation committees.

https://www.na.org/admin/include/spaw2/uploads/pdf/TBasics_Feb2017.pdf

World Services Board of Trustees Bulletin #19: Gender-specific language and use of the word “God” in NA literature

<https://www.na.org/?ID=bulletins-bull19>

Addendum F: List of materials we publish including translations: page 135

Motion 12 To direct the World Board to create the Spanish-language *Narcotics Anonymous* (Basic Text), *Step Working Guides*, and *It Works: How and Why* available in an audio format.

Intent: To increase access to NA Literature for the Spanish-speaking community.

Maker: Southern California Region

Financial Impact: The financial impact for this is difficult to estimate accurately. The cost to make the English and Spanish Basic Text available in MP3 format is approximately \$12,000 each, which includes the expense of professionally recording the text and proofing the recordings. The direct cost of what this motion is asking for is approximately \$20,000 since *It Works* is already recorded.

However, we recommend an approach that begins with the Basic Text and treats all language groups equally rather than focusing solely on one language. If the expense for the other language versions of the Basic Text were consistent with the Spanish and English Basic Texts, the total direct cost, without staff time, for currently translated Basic Texts would be approximately \$384,000. However, we know some of the recordings—Swedish, Danish, and Lithuanian, among other languages—are already completed. And some of the costs to produce other language versions will vary. We are currently in the process of recording the Arabic Basic Text, and we estimate that expense to be less than \$2,000.

Rationale by Region: Many Spanish-speaking persons leave school in the third or fourth grade and illiteracy is a large problem. NA Literature is written in Castilian Spanish that is much easier to comprehend when spoken due to the variations in Spanish across the globe. This motion is also requested on behalf of our blind Spanish-language members. Creating audio access is not an item the LAZF is addressing because they are doing the written translations. There is a dire need for auditory access to NA literature in the Spanish-speaking community of Southern California and it would also greatly benefit Spanish-speaking addicts elsewhere in the United States and the world. Spanish is the second most spoken native language in the world. Our members have experienced that access to printed material is limited in rural and underdeveloped areas of Mexico and other Spanish-language countries whereas internet cafés and cellphones are much more readily available. This motion is also presented to prevent rogue audio translations, which is likely to occur as this is a pressing need. This proposal is also likely to attract younger members.

World Board Response: We are in the process of working with local translation committees and zones to create the audio version of the Basic Text to post on na.org free of charge. We have previously reported that, given the pricing policies and mandates of commercial portals for audiobooks, we see no effective way to distribute this material through a paid portal that makes sense for our members.

We appreciate the spirit of this motion, but we are recommending an approach that is not focused exclusively on one language. As we reported at WSC 2018, we are actively in the process of updating audio files for Basic Texts in the languages in which it is published. We plan to post these on www.na.org for no charge to access. We ask for your patience as we get this first step accomplished.

This effort includes working with the approval panel for Spanish-language translations that is part of the Latin American Zonal Forum to produce an audio version of the Sixth Edition Basic Text. We would like to continue with that effort and get the audio Basic Texts posted first. Accessibility to our literature is a primary concern for us, and audio versions of the Basic Text (currently 32) seem like the logical place to start. Let's see how this process works with the Basic Text first, and then we can evaluate the effort and decide on the next step for English, Spanish, or any other language.

Policy Affected: None.

Motion 13 To direct the World Board to create a project plan for consideration at the WSC 2022 to investigate changes and/or additional wording to NA literature from gender specific language to gender neutral and inclusive language.

Intent: This motion will give the conference and the Fellowship the ability to meaningfully discuss changes to our literature to be more inclusive of all our members.

Maker: Sweden and Australia Regions

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Regions: Our literature currently makes multiple references to gender specific and exclusive language.

We recognise the importance of being able to identify oneself with the language described in our texts in order to embrace the programme. In our Fellowship there are many who identify as LGBT+, who have experienced being made invisible in a great variety of situations. As a worldwide Fellowship we acknowledge that many cultures embrace non-binary individuals.

Many of our members have expressed reservation at the male pronoun references to God, which may invoke an image of a specific God or religion. We believe this conflicts with our philosophy which encourages all members to develop a personal relationship with a God of our own understanding.

In NA we are addicts first and foremost and we must always keep our doors open for all addicts who have a desire to recover. We want our literature to be inclusive to all, regardless of how we might identify.

The personal stories section of our Basic Text contains stories from transgender individuals, and we wish to build on this gender-neutral foundation to reflect in all NA text. We allow for personal stories to be exempt from gender-neutral language and remain as they are currently written.

When collaborating with Sweden and Australia it became clear that Sweden wished to have gender-neutral language that was complimentary to the existing language, whereas Australia felt that replacement was the way to proceed. The motion has been written as such that all options can be explored in the project plan and recommendations provided back to the WSC and Fellowship.

World Board Response: The project called for in this motion does not direct any change. It seeks to open a discussion. As the intent explains, “This motion will give the conference and the Fellowship the ability to meaningfully discuss changes to our literature to be more inclusive of all our members.”

We anticipate the discussion would be focused on English-language literature, because our literature is developed in English, and the English texts act as the prototype for any translation efforts. Translations may raise issues beyond the scope of this discussion. Different languages handle gender differently, and local translation committees are familiar with what they need to do to be consistent with the English texts.

We have had related discussions in the past, but not since the early 1990s, and those discussions were dominated by a consideration of whether to use the word *God* in NA literature, while the discussion this motion seeks to open is specifically about gender neutrality. The trustee bulletin on gender-specific language was written in 1992, when there were fewer than 20,000 NA meetings worldwide and the Basic Text was published in four languages. Now there are more than 70,000 meetings and we publish the Basic Text in 32 languages. Our membership has grown and diversified over the years.

So again, this motion is not a decision to make any changes; it’s about whether we’re willing to have the discussion. We support the idea of having a discussion and believe it is our collective responsibility to look at how our message is perceived.

Policy Affected: None.

Motion 14 To place an 8-year moratorium on the creation of new English language recovery literature after WSC 2020 to WSC 2028, excluding any literature projects already in development.

Intent: To allow time and potentially free up resources for foreign language literature translation and production.

Maker: California Inland Region

Financial Impact: It is not possible to estimate the financial impact of this motion. There could be a savings resulting from not funding literature projects and workgroups, but there could also be a loss from not producing any new literature for sale.

Rationale by Region: A moratorium would allow international NA communities time to complete translations of our basic text and other lifesaving literature and hopefully allow the funds typically used for English language literature development to be redirected toward supporting international translation efforts.

Imagine struggling to read our lifesaving message in a language you may not read well, or at all. We are a global fellowship and it is time to redouble our efforts to make our message available globally.

World Board Response: We share the desire to make our literature more accessible to addicts around the world. We look forward to a day when “every addict in the world has a chance to experience our message in his or her own language and culture.” We publish in more than 55 languages today. The literature list included in Addendum F of this *CAR* is testimony to the hard work of so many members and World Services’ dedication to translations.

This motion, however, would not free up resources for translations or production. These efforts—English-language literature production and translations and production of “foreign” language material—are unrelated. The motion would not achieve what it intends to accomplish.

NA translations work is coordinated among a local translation committee (LTC) made up of committed members who are native speakers, NAWS staff, and contracted professionals. In most cases, we use the professional translator as a proofreader and copyeditor to go over the LTC’s work. In some cases, a professional will also do some of the initial translations if the LTC is not able to. But it is critical that local members be involved to ensure that the language rings true to NA experience. LTC service is time-consuming and requires both skill and dedication. It takes a great deal of resources to produce translated literature, but the scarcest resource is actually human, particularly local LTC members.

Policy Affected: None.

PR MATERIALS

Motion 15 Instruct the World Board to develop a project plan for the 2022 World Service Conference (WSC) to produce an informative video about Narcotics Anonymous, for Public Relations services [committees] and online publication, approved by NAWS, where it is briefly explained:

1. What is Narcotics Anonymous
 2. How it works
 3. How to contact NA
-

Intent: That the fellowship has a new Public Relations resource that explains clearly and briefly what Narcotics Anonymous is, how it works and the ways to contact NA.

Maker: Argentina Region

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: Public relations are very important for our fellowship, a brief explanatory video about Narcotics Anonymous would allow the service bodies of all NA areas and regions of the world to have one more tool in their PR efforts. This resource could be used in PR services [committees] and online publications (web, social media, etc.)

At the same time audiovisual media, including digital media, are fundamental to communications today. Right now, there are multiple informative videos about NA, but none of them was produced and approved by NAWS. The production of this video will be an effective tool for all NA regional service committees.

The video could be originally produced in English, with a simple language and include the script in written form, separate the audio tracks and make it available for download on the na.org website.

This will allow that non-English-speaking NA regions can be easily translated locally, making this service material available to the NA regions that require it easily.

World Board Response: We know there is a need for adaptable current PR resources, and it seems wise for World Services to produce such a video. Such a resource would help professionals and members of the public know who we are and what we have to offer. Our vision is that one day “Narcotics Anonymous has universal recognition and respect as a viable program of recovery,” and this kind of tool could be instrumental in that effort.

We have been releasing Board-approved materials for a 90-day delegate review before finalizing drafts, and we imagine this resource would be subject to the same process, as has been the case with other PR materials. Delegates would have an opportunity to give input on the content before the video is approved.

Policy Affected: None.

WSC POLICIES

Motion 16 If any Motion or Proposal, in Content or Intent, has been submitted and failed to achieve consensus or adoption at two consecutive World Service Conferences, the previously proposed Content and Intent may not be suggested to the Fellowship in the Conference Agenda Report (CAR)/Conference Approval Track (CAT) or at the WSC for one entire conference cycle.

Intent: To use the Fellowship's decision-making processes and time responsibly and effectively.

Maker: Volunteer and Southern California Regions

Financial Impact: None.

Rationale by Regions: By temporarily setting aside ideas and motions that have not been developed fully, this motion gives the WSC the opportunity to focus its limited time and resources on issues that have garnered a wide attention and direction for the body to decide. It also allows the makers of these motions time to develop the idea and build greater understanding and consensus within the Fellowship. This motion allow us to improve in how we carry out our services and try to learn from challenges and processes that do not yield a consistent or beneficial result.

World Board Response: This motion seems to be about respecting the spirit of consensus-based decision making: If the same idea has been discussed repeatedly and is not supported, allow the Conference to take some time before picking the idea up again.

We agree with the spirit of this idea and the ideas expressed in the motion's rationale, but we have concerns that the motion as it is written might be difficult to implement and have unintended consequences. We are not sure how the WSC would account for motions with minor differences, for example, or motions that are very different but have the same intent. For instance, the intent of this motion is "to use the Fellowship's decision-making processes and time responsibly and effectively." We can imagine many very different motions that might express the same intent. Also, the motion doesn't leave room for new information that might arise, which would motivate the WSC to want to consider the same issue again.

Improving the effectiveness of the WSC has been a focus of ours for many cycles now, and we appreciate that participants are thinking about how to maximize our week together and use the WSC's time responsibly, but we don't believe this is a practical way to accomplish that.

Policy Affected: None.

Motions & Survey Tally Sheet

We created this tally sheet for you to collect responses on the *Conference Agenda Report* motions and survey. The CAR is available for download from the Conference webpage: www.na.org/conference. In addition to the motions and survey, the CAR contains essays with important relevant content. Summary videos of the CAR will be available at www.na.org/conference soon after the release of the CAR.

MOTIONS			
#1	Maker: World Board To approve the NAWS Long-Term Goals, which serve as the foundation of the NA World Services Strategic Plan.	Yes	No
#2	Maker: World Board To approve the IP contained in Addendum A, “Mental Health in Recovery,” as Fellowship-approved recovery literature.	Yes	No
#3	Maker: World Board To approve the revisions to the <i>FIPT</i> Operational Rules contained in Addendum B. A summary of the proposed changes shown in Addendum B includes: • A change to the Inspection Clause to reflect discussions at WSC 2018 and clarify that only the WSC can act for the beneficiary—the NA Fellowship as a whole. • Various “housekeeping” edits: - o A change to the description of WSC Boards and Committees on page 11 to the World Board. - o Two edits to Section 12: Trustee Reporting Obligation on page 15 to change <i>calendar year</i> to <i>fiscal year</i> and to add <i>independent</i> to the description of the annual audit. - o Changing <i>representatives</i> to <i>delegates</i> on page 24 of the Reader’s Notes. - o A straight copyedit by adding the word <i>the</i> on the same page and other edits on pages 15 and 31. - o A change to the way the Inspection Clause is described on page 37 of the Reader’s Notes.	Yes	No
#4	Maker: World Board To approve the revisions to NA <i>Intellectual Property Bulletin #1</i> contained in Addendum C. This bulletin has been largely rewritten. A clean copy of the bulletin with proposed revisions is contained in Addendum C. A copy tracking the proposed changes is included in Addendum D. A summary of the proposed changes to <i>Intellectual Property Bulletin #1</i> includes: • Permission would be required to reprint book-length pieces. • Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats. • The introduction has been rewritten and the section on copyright has been moved ahead of the section on trademarks. • Some copyediting changes are suggested, such as using the term <i>policy</i> throughout the document, rather than a mix of <i>policy</i> and <i>guidelines</i>.	Yes	No

#5	Maker: World Board To approve the initiation of the established process to revise the <i>Fellowship Intellectual Property Trust</i> in the 2020–2022 Conference cycle. SECTION 2: REVISION OF TRUST INSTRUMENT Provisions of the Trust Instrument may be changed only under the following conditions: 1. Any motion to review proposed revisions to the Trust Instrument must receive the approval of a majority of regional delegates at the World Service Conference. 2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the <i>Conference Agenda Report</i> for adoption. 3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of “yes” from two-thirds of those regional delegates recorded as present in the World Service Conference roll call immediately prior to the vote.	Yes	No
#6	Maker: Norway Region To direct the WB to create a project plan for WSC 2022 to create a new Step Working Guide for members whom have worked through the previous one and would like to evolve in their recovery.	Yes	No
#7	Maker: Baja Son Region To direct the World Board to develop a project plan, for consideration at WSC-2022, to create a booklet of Step study questions with the parameter that each question is derived from one sentence in the Basic Text chapter ‘How It works’.	Yes	No
#8	Maker: Argentina Region To direct the World Board to create a project plan for the World Service Conference (WSC) 2022, the development of a new IP for daily personal inventory of gratitude.	Yes	No
#9	Maker: Iran Region To direct the World Board to create a project plan for WSC 2022 to create a new IP for women in recovery.	Yes	No
#10	Maker: Latin American Zonal Forum To direct the World Board to create a project plan for consideration at WSC 2022 to create a guide for online meetings.	Yes	No
#11	Maker: Carolina Region To direct the World Board to create a project plan for WSC 2022 for a service pamphlet (SP) that explains “being under no surveillance at any time”.	Yes	No
#12	Maker: Southern California Region To direct the World Board to create the Spanish-language <i>Narcotics Anonymous</i> (Basic Text), <i>Step Working Guides</i>, and <i>It Works: How and Why</i> available in an audio format.	Yes	No
#13	Maker: Sweden and Australia Regions To direct the World Board to create a project plan for consideration at the WSC 2022 to investigate changes and/or additional wording to NA literature from gender specific language to gender neutral and inclusive language.	Yes	No

#14	Maker: California Inland Region To place an 8-year moratorium on the creation of new English language recovery literature after WSC 2020 to WSC 2028, excluding any literature projects already in development.	Yes	No
#15	Maker: Argentina Region Instruct the World Board to develop a project plan for the 2022 World Service Conference (WSC) to produce an informative video about Narcotics Anonymous, for Public Relations services [committees] and online publication, approved by NAWS, where it is briefly explained: 1. What is Narcotics Anonymous 2. How it works 3. How to contact NA	Yes	No
#16	Maker: Volunteer and Southern California Regions If any Motion or Proposal, in Content or Intent, has been submitted and failed to achieve consensus or adoption at two consecutive World Service Conferences, the previously proposed Content and Intent may not be suggested to the Fellowship in the Conference Agenda Report (CAR)/ Conference Approval Track (CAT) or at the WSC for one entire conference cycle.	Yes	No

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

NEW RECOVERY LITERATURE (CHOOSE UP TO 3)	
Literature to support Step work	
Booklet of Step study questions taken from “How It Works” in the Basic Text	
Step working booklet focused mainly on Steps 1–3 aimed primarily at new members and those in treatment and drug courts	
Step working guide aimed at members not new to working the Steps	
Literature exploring specific spiritual principles	
List and definition of spiritual principles	
The spiritual benefits of service	
Members’ experience, strength, and hope on trustworthiness and trusting the process	
Maintaining gratitude in early recovery	
Create a new IP or booklet	
On doing a daily personal gratitude inventory	
On using social media in NA	
Personal stories about relationships and families in recovery	
Dealing with trauma/PTSD in recovery	
Atmosphere of recovery in service	
Dealing with grief in recovery	
What is Narcotics Anonymous? (for newcomers and visitors)	
Literature for atheists and agnostics	
What does it mean that NA is a spiritual, not religious, program?	
Literature for younger members	
Literature for older members	
Literature for experienced members/“oldtimers”	
Literature for LGBTQ+ members	
Literature for women in recovery	
Literature for First Nations/indigenous members	
Literature for members who are professionals	
Literature for members who are veterans	
Other	
Other:	
No new recovery lit	

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

REVISIONS TO EXISTING RECOVERY LITERATURE (CHOOSE UP TO 2)	
Revise an existing piece of NA literature	
Revise <i>The Narcotics Anonymous Step Working Guides</i>	
Revise the <i>Sponsorship</i> book	
Revise IP #21 <i>The Loner</i>	
Revise IP #6 <i>Recovery and Relapse</i>	
Revise IP #26 <i>Accessibility for Those with Additional Needs</i>	
Revise IP #7 <i>Am I an Addict?</i>	
Revise IP #20 <i>H&I Service and the NA Member</i>	
Revise IP #15 <i>PI and the NA Member</i>	
Revise <i>Twelve Concepts for NA Service</i>	
Review currently approved recovery literature to gender-neutralize NA literature where possible	
Other	
Other:	
No revisions	

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

SERVICE MATERIAL (CHOOSE UP TO 4)	
Service materials to support individuals' efforts	
Carrying the NA message effectively	
How to be a trusted servant in NA	
Personal application of the Concepts and Traditions	
Applying and working the Concepts	
Respect as a spiritual principle of service	
Public relations	
Our public image: creating confidence in NA	
More social media guidelines above and beyond the service pamphlet	
More short, focused PR resources such as tools to assist in reaching the medical community, criminal justice, and those who refer people to NA	
Sponsorship behind the walls basics	
NA Services 101	
Online meetings best practices	
Best practices for virtual service meetings	
The impact of technology on services and workloads	
Best practices for service workshops	
Facilitation basics	
Create a service pamphlet explaining what we mean by "under no surveillance at any time"	
What is NA World Services and how does it work?	
Fellowship development basics	
Cooperation, not affiliation—our relationship to others, including AA	
Collaboration among service bodies	
When service bodies split or reunify	
Description of service commitments at areas and regions	
Effective report writing	
Tools for mentorship, including as it relates to service bodies and new meetings	
Group support forum, local service conference, and local service board basics	
Policy in NA—different kinds of policy styles and approaches	

Service Material continued on next page.

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

Legal, financial, and Seventh Tradition tools	
How we apply the principle of self-support in NA.	
Fund flow in the digital age	
Fundraising—what is appropriate?	
Information for creating legal entities/incorporating	
The <i>Fellowship Intellectual Property Trust (FIPT)</i> and local websites	
Dealing with banks and government financial regulations	
Dealing with misappropriation of NA funds	
Area treasurers' and budgeting basics	
Revise existing service material	
Update <i>A Guide to Local Service in NA (GLS)</i>	
Revise <i>Translation Basics</i>	
Revise and update <i>Planning Basics</i>	
Revise and update <i>PR Basics</i>	
Revise and update <i>H&I Basics</i>	
Revise and update the service pamphlet <i>Disruptive and Violent Behavior</i> to reflect current practices in the Fellowship and include the issue of sexual predators	
Revise and update the service pamphlet <i>Group Business Meetings</i> , with a section on using a CBDM process, and the concept of delegation	
Other	
Other:	
No new or revised service material	

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

ISSUE DISCUSSION TOPICS (CHOOSE UP TO 4)	
IDTs for 2020–2022 cycle	
DRT/MAT as it relates to NA—what do we want to say in a piece of NA literature?	
What it means to be self-supporting in NA	
The <i>Fellowship Intellectual Property Trust</i> (FIPT) and upcoming revisions	
Our Symbol—a closer look	
The importance of our Traditions to NA	
Group conscience and consensus-based decision making	
PR Basics—what they are and why they are important	
Simplicity and flexibility in service	
Empathy and respect in service—practicing spiritual principles	
Growing NA in established communities	
Social media and PR issues	
Dealing with disruptive and predatory behavior	
Making NA accessible for those with additional needs	
Getting youth and newcomers involved	
Becoming a better sponsor	
Creating community in NA	
Mentoring and learning in service	
Leadership in NA	
The integrity and effectiveness of our communications	
Eleventh Concept—NA funds are to be used to further our primary purpose and must be managed responsibly	
Building our unity while respecting our differences	
Retaining members in NA	
Illness/medication and our literature	
Using <i>Guiding Principles</i> to frame discussions on current issues/challenges	
Other	
Other:	

Members can fill out this survey online at www.na.org/survey until 1 April 2020.

QUESTIONS TO HELP FRAME WSC DISCUSSIONS

1. Should Fellowship-approved material be limited to items that address personal recovery and/or establish fundamental NA philosophy and policies? Currently, Fellowship-approved material includes some items that are addressed to members but are not directly about personal recovery, such as IP #15 *PI and the NA Member* and IP #20 *H&I Service and the NA Member*, as well as items that are addressed to groups or service bodies, such as IP #2 *The Group* and IP #26 *Accessibility for Those with Additional Needs*.
2. Do you support updating at least one IP per Conference cycle?
3. A relatively small number of groups stock service pamphlets or group-related tools. Do you believe this is due to: (choose all that apply)
 - ☐ Cost
 - ☐ Awareness
 - ☐ Fitting into a literature rack
 - ☐ The designation on the front cover that these are not to be read in a meeting
 - ☐ Other:
4. What other ideas do you have for getting approved service materials to groups and members more easily?

Glossary

Area Service Committee (ASC)

The area committee is the primary means by which the services of a local NA community are administered. The ASC is composed of group service representatives, administrative officers (chairperson, vice chairperson, secretary, treasurer), subcommittee chairpersons or project leaders, and the area's regional committee members. The ASC elects its own officers, subcommittee chairpersons or project leaders, and RCMs.

Biennial

Occurring every two years. (Biannual means occurring twice a year.)

Candidate Profile Report (CPR)

A packet containing information (individual reports) on each candidate nominated by the Human Resource Panel for consideration for election by the WSC. These reports are intended to assist Conference participants in their evaluations of candidates.

CBDM

Consensus-based decision making. Consensus refers to the consent of the group, meaning the willingness on the part of all members of a group to move forward with a decision. The Conference uses a form of CBDM that is based on respect for all persons involved in the decision being considered, but does not necessarily mean the final decision is unanimous.

Conference Agenda Report (CAR)

A publication that consists of business and issues that will be considered during the biennial WSC meeting. The CAR is released a minimum of 150 days prior to the opening of the Conference, with translated versions released a minimum of 120 days prior. The CAR, in all the languages in which it is published, is available at no charge on the Web at www.na.org/conference.

Conference Approval Track (CAT)

A term used to describe items sent to Conference participants 90 days prior to the World Service Conference. Included are the WSC seating report, the draft budget, the NAWS Strategic Plan and proposed project plans for the upcoming Conference cycle, material being presented for consideration under the service material approval process, and any regional ideas submitted for Conference consideration.

Conference-Approved

There are three different approval tracks for NA material: Conference-approved, Fellowship-approved, and World Board-approved. Conference-approved material includes NA handbooks and service booklets that tend to convey NA's fundamental ideas about certain areas of service. These pieces may or may not have been sent out for review and input according to the specifics of the project plan presented to the WSC. Conference-approved material is included in the Conference Approval Track material for approval at the upcoming WSC, unless the Board decides there is enough interest to include the material in the *Conference Agenda Report*. Both Conference-approved and World Board-approved materials are intended to show how to implement, or put into practice, the principles established by core NA philosophy and Fellowship-approved literature. (See the essay on page 37 of this CAR and the literature and service materials list in Addendum F for more information.)

Conference Cycle

The two years between World Service Conferences. For the current Conference cycle, that refers to the two fiscal years running from 1 July 2018 to 30 June 2020.

Conference Participants (CP)

For the purposes of decision making, participants are defined as regional delegates, zonal delegates, and World Board members. Only delegates vote on items that have appeared in the *Conference Agenda Report*, with the exception of the approval of new pieces of recovery literature. Only regional delegates participate in these votes.

Conference Report (CR)

This report is sent to WSC participants shortly before the World Service Conference to help them prepare for the WSC. Regional reports are distributed or posted online along with the *Conference Report*, and delegates and regions may also have articles published.

Conventions and Events Tools

Part of the Training and Tools Project Plan approved at WSC 2016 and reaffirmed at WSC 2018. Developing new tools that reflect the Fellowship's current best practices and experience related to conventions and events service was one of two areas prioritized in the 2016 CAR survey. For more information, see www.na.org/conventions. See also Local Service Toolbox.

Environmental Scan

An environmental scan is part of a strategic planning process. In NAWS every two years, preliminary to the creation of our strategic plan, we look at internal and external factors that might influence the work we are able to accomplish or that we wish to take on or prioritize. Conference participants were asked to submit input to the NAWS environmental scan for the first time in the 2016–2018 Conference cycle, and again in the 2018–2020 cycle.

Fellowship-Approved

As explained in GWSNA: "All NA recovery material is Fellowship-approved. This means that it is developed by NA World Services, sent out to the Fellowship for review and input, and ultimately sent out for approval by the Fellowship in the *Conference Agenda Report*. . . . This applies to all recovery books, recovery booklets, and recovery pamphlets as well as material that establishes or changes philosophical position or NA principles." (See the essay on page 37 of this CAR and the literature and service materials list in Addendum F for more information.)

Fellowship Development (FD)

We engage in a large variety of activities that are directed to members and/or designed to help NA communities in their efforts to carry the NA message and to further our primary purpose and vision. This includes, but is certainly not limited to, producing publications such as *The NA Way Magazine* and *Reaching Out*, putting on and helping with Fellowship workshops, participating in public relations activities, answering emails and calls from members, and providing free or reduced-cost literature for communities in need. We refer to all of this activity as Fellowship development, since that is its purpose.

Fellowship Intellectual Property Trust (FIPT)

A legal trust that serves as custodian for NA's recovery literature and logos (trademarks) approved by the Fellowship in April 1993. The FIPT's purpose is to ensure that NA's property is held in trust for all of NA and kept safe for members yet to come, in keeping with our primary purpose. The document creating the FIPT is called a *trust instrument*; it explains how NA's literature and trademarks are managed and protected for the benefit of the Fellowship as a whole. For more information, see www.na.org/fipt.

Group Support Forum (GSF)

A discussion-oriented body focused on the needs of the groups. Group support forums are open to all members and oriented toward group issues, orientation, and training.

Guide to Local Services in Narcotics Anonymous, A (GLS)

A service handbook, approved in 1997, intended to serve as a resource for NA groups, areas, regions, and their subcommittees in establishing and providing local services.

Guide to World Services in Narcotics Anonymous, A (GWSNA)

A compilation of policy decisions that have been approved by the World Service Conference, including WSC guidelines. The name was changed from *A Temporary Working Guide to Our World Service Structure* (TWGWSS) in 2002. TWGSS, its precursor, was first published in 1983 as the temporary successor to the *NA Service Manual* (aka *The NA Tree*), which in turn was first published in 1976.

Human Resource Panel (HRP)

Provides the World Service Conference with a list of qualified candidates for election to the World Board, the Human Resource Panel, and the WSC Cofacilitator positions. Is also responsible for administering the World Pool. Consists of four members elected by the WSC.

IP

Acronym for informational pamphlet.

Issue Discussion Topics (IDT)

Specific topics that concern the Fellowship as a whole, to be discussed by the Fellowship during the Conference cycle. For more information, see www.na.org/idt.

Local Service Board (LSB)

An administrative body overseen by the local service conference. The LSB is responsible for administering the work prioritized by the LSC and coordinating its meetings.

Local Service Conference (LSC)

A strategic, planning-oriented service body. LSCs deliver services through a mixture of project-based workgroups, ongoing services performed by committees, and services organized by coordinators, depending on local need. They primarily utilize consensus-based decision making.

Local Service Toolbox

Part of the Training and Tools Project Plan approved at WSC 2016. Developing new tools that reflect the Fellowship's current best practices and experience related to local service was one of two areas prioritized in the 2016 CAR survey. For more information, see www.na.org/toolbox. See also Conventions and Events Tools.

NA Way Magazine, The

Published quarterly, *The NA Way Magazine* currently offers articles about service, recovery-oriented stories, and entertainment, as well as a calendar of international NA events. Available by request in English, Farsi, French, German, Japanese, Portuguese, Russian, and Spanish, and posted at www.na.org/naway.

NAWS

Acronym for Narcotics Anonymous World Services.

NAWS Annual Report

An annual publication providing an overview of NAWS activities and finances for each fiscal year.

NAWS News

A newsletter sent out by the World Board after each Board meeting reporting on their current activities. Published in English, French, German, Portuguese, Spanish, and Swedish. Sent to all Conference participants, registered areas, and regions, and posted at www.na.org.

Project Plan

Developed by the World Board for all prospective, nonroutine World Service projects. Includes the proposed scope of the project, a budget, and a timeline. Included in the Conference Approval Track material as part of the budget, and approved by delegates at each Conference.

Public Relations

Creating and maintaining relationships with members, potential members, and the general public, including professionals, families, and loved ones, in an effort to more effectively carry the NA message of recovery.

RBZs

Candidates for nomination to World Service positions who have been put forward by regions, the World Board, or zones. These potential candidates are interviewed by the Human Resource Panel.

Reaching Out

A quarterly World Services publication to help incarcerated addicts connect to the NA program and to enhance H&I efforts.

Regional Assembly

A gathering of group service representatives (GSRs) and regional committee members (RCMs) conducted by the regional service committee, to discuss regional issues and those affecting NA worldwide, usually in preparation for the biennial WSC meeting. The regional delegate is sometimes elected at the assembly.

Regional Delegate (RD)

Attends the WSC as a voting participant from an NA region (or equivalent service body). Is responsible for helping with communication between the region and World Services throughout the Conference cycle.

Regional Service Committee (RSC)

A body that draws together the combined service experience of a number of adjoining areas for mutual support of and service to those areas. Composed of RCMs, the regional delegate, alternate delegate, and others as needed.

Service Pamphlets (SPs)

Pamphlets intended for use as a resource for groups and service bodies covering some topics related to service in NA. These pamphlets are developed, released for a 90-day delegate review, and approved by the World Board, who can also revise them if the need arises. They are the Board's best attempt at collecting some of the more successful practices in our Fellowship in dealing with sensitive or difficult topics.

Service System

The service system in NA consists of four main components: people, processes, resources, and structure. The Service System Project was created to take an overall view of how to improve local services and address some of the long-standing challenges in service delivery. For more information, see the project page at www.na.org/servicesystem.

Service System Proposals

A series of documents produced by the World Board that includes ideas and recommendations for changes or innovations to the NA service system. The service system essay from the 2014 *Conference Agenda Report* offers an explanation of the main ideas from the project, along with background information on the project itself.

Strategic Plan

A long-term strategy for World Services to provide new or improved services and support that facilitates the continuation and growth of Narcotics Anonymous worldwide. The project plans stem from the objectives in the strategic plan.

Straw Poll (see also Vote)

A nonbinding poll conducted to gauge the general sentiment of the Conference toward a particular topic or idea. Often motions or amendments are straw polled more than once before a vote is taken. Straw polls are also used during the closing session of the Conference to ensure that the Conference has a common understanding of the week's decisions and discussions.

Twelve Concepts for NA Service

Fundamental NA principles guiding our groups, boards, and committees in service affairs. Fellowship-approved in 1992; published as a booklet with essays and study questions as a self-titled booklet.

Vision for NA Service, A

A view of what our services are striving to accomplish that serves to guide and inspire us. Approved unanimously by WSC 2010 after being included in that year's *Conference Agenda Report*.

Vote

A vote happens when the body makes a decision on an item. See page 8 of *A Guide to World Services in NA* for a list of decision-making sessions at the Conference.

Webinars/Web Meetings

Virtual meetings or workshops. Sometimes webinars consist of a presentation followed by questions and answers. Sometimes they are more interactive, in which case we refer to them as "web meetings." World Services hosts web meetings related to PR, H&I, service offices, inmate step writing committees, regional service offices, ongoing projects, and rural and isolated communities. Virtual workgroups also meet through web meetings, and the Board holds web meetings for Conference participants.

Workgroups

Small working bodies responsible to the World Board, created for a specific purpose.

World Board

The World Board is the service board of the World Service Conference. The Board provides support to the Fellowship of Narcotics Anonymous in the Fellowship's effort to carry the message of NA. Oversees the activities of NA World Services, including our primary service center, the World Service Office. The Board also holds in trust for the NA Fellowship the rights for all its physical and intellectual properties (which include literature, logos, trademarks, and copyrights) in accordance with the will of the Fellowship as expressed through the WSC.

World Board–Approved

Service-related informational pamphlets and tools approved and published by the World Board after a 90-day delegate review period. This material contains practical experience gathered from the Fellowship about how to apply some of the principles contained in NA Fellowship- and Conference-approved material. (See the essay on page 37 of this CAR and the literature and service materials list in Addendum F for more information.)

World Pool

A pool of members' information demonstrating a variety of recovery- and service-related experience as well as any skills necessary for the successful completion of world-level service assignments. All NA members with over five years clean are eligible to enter the World Pool.

World Service Conference (WSC)

The Conference is not an entity; it is an event—the coming together of the NA Fellowship from around the globe. Every two years regional and zonal delegates, the members of the World Board, and the executive director of the World Service Office meet to discuss questions of significance to the Fellowship of Narcotics Anonymous. The World Service Conference is the one point in our structure where the voice of NA as a whole can be heard regarding issues and concerns affecting our worldwide Fellowship. The Conference is a vehicle for Fellowship communication and unity, a forum where our common welfare is itself the business of the meeting.

World Service Office (WSO)

The name of the physical location of the primary worldwide service center for NA World Services. The headquarters is located in Chatsworth (Los Angeles), California, USA, with branch facilities in Canada, Belgium, Iran, and India. The WSO prints, stocks, and sells NA Fellowship-, World Board-, and Conference-approved literature, service handbooks, and other materials; provides support for NA groups and communities; and serves as a clearinghouse for information about NA. “The basic purposes of our world services are communication, coordination, information, and guidance. ” (GWSNA)

WSC Cofacilitator(s)

Two individuals who preside over the CAR- and CAT-related Discussion and Decisions sessions of the World Service Conference. Elected by the World Service Conference.

WSC of the Future Project

An ongoing project focused on the future of the World Service Conference and how we can ensure the Conference best meets the needs of NA now and in the years to come. For more information, see www.na.org/future.

Zonal Delegate (ZD)

Attends the WSC as a voting participant from an existing NA zone with two or more unseated regions or communities. Is responsible for helping with communication between the zone and World Services throughout the Conference cycle.

Zonal Forums

Service-oriented sharing and/or business sessions composed of multiple regions that provide means by which NA communities can communicate, cooperate, and grow with one another.

Addendum A

IP #30 Mental Health in Recovery Approval Draft

Mental Health in Recovery

“Although the specifics of mental health recovery in my life (medication, therapy, and other treatment options) may be outside issues, dealing with my mental health issues and recovery in this arena is as critical to my ability to stay clean and work a program of recovery in Narcotics Anonymous as being powerless, surrendering, and finding a power greater than me.”

In the Narcotics Anonymous program, every addict with a desire to stop using can be a member, and no member of NA need ever recover alone. Recovery is our common bond. Even though some of us may feel hopeless because of the wreckage of our active addiction, we are not helpless. We are able to benefit from the experience and suggestions of other members who are recovering in NA.

Getting clean and working Steps in NA leads all of us to find ways to take better care of our minds, bodies, emotions, and spirits. Through the process of working the Steps with a sponsor and learning to take better care of ourselves, many of us find it necessary, at some point in our recovery process, to seek outside assistance for problems other than addiction.

This piece of literature reflects the shared experiences of NA members, including those who have found it necessary to seek outside help for mental health concerns and other members who are recovering alongside them. In this pamphlet, there are sections meant to help all NA members with challenges that arise—the decision to seek help, concerns about medications, and the stigma of mental health challenges, recovery, service, and supporting each other.

Seeking Professional Help

We do not diagnose anyone’s condition or track the progress of our patients—in fact, we have no patients, only members. Our groups do not provide professional therapeutic, medical, legal, or psychiatric services. We are simply a fellowship of recovering addicts who meet regularly to help each other stay clean.

It Works: How and Why, “Tradition Eight”

The Eighth Tradition in NA aptly illustrates that our focus is sharing a message of recovery from addiction. Addicts who have thoughts or concerns about their mental health may want to seek professional help. Some members have experienced that professional help aids them in facing a crisis outside of their recovery in NA; others may find that long-term therapy and medications are warranted. There are many additional options available to us; we research what we think may be best and discuss them with our sponsors and appropriate healthcare professionals. Our shared experience is captured well in Chapter Four of *Living Clean*: “When we use the tools available to us—calling our sponsor and seeking the experience, strength, and hope of others, allowing our support group to support us, and turning to *In Times of Illness* and other NA literature—we are able to make decisions we can be comfortable with, and take action to do the next right thing.” We are free to pursue our recovery from addiction in NA.

We engage in our recovery through honest sharing with a sponsor. Many of us have found that shame and secrecy in any area of our lives opens a window for relapse. We need to be honest and truthful about our mental health—along with any medications that we take in our recovery. Working closely with our sponsor and other trusted NA members can help us to remain aware of our motives. Each of us is responsible for our own recovery and well-being.

Medication and Mental Health

It is possible to find freedom from active addiction in NA and to be taking medication prescribed by an informed healthcare professional for a mental illness.

In Times of Illness, “Mental Health Issues”

In NA, our primary purpose is to carry a message of recovery—this is true no matter what extenuating situations may present themselves. Attempting to address mental health challenges goes beyond the scope of carrying our message or helping other addicts to stay clean. In meetings, no one is a professional; we are all addicts seeking freedom from active addiction.

We may be advised at some point in our recovery to take medications to treat our mental health condition. Medications are to be taken as prescribed by an informed healthcare professional; we do not self-medicate. Many of us have found it wise to inform our sponsors and a few friends in our support network that we are taking medication. This action helps us to be accountable and allows others we trust to be our “eyes and ears.”

With medication, it is important to be mindful and aware of changes that may occur. The longer we are clean, the more our physical and emotional selves change; sometimes, these changes may have an effect on our mental health condition. Honestly sharing any perceived changes with our sponsors, informed healthcare professionals, and supportive friends is a critical step in maintaining a program of recovery.

Many of us have heard, either individually or in meetings, that members taking medication are not clean. However, some mental health medications are prescribed to help manage symptoms that interfere with leading a healthy, productive, drug-free lifestyle. Members who take mental health medication as prescribed by a healthcare professional are considered clean.

Stigma and Shame

... our struggles with our mental illnesses and the way they impact our recovery are very much “inside issues.” We need to make this distinction to ensure that we don’t fail to seek additional help either because of stigma in the rooms or confusion about the relationship between mental illness and recovery.

Living Clean, “Our Physical Selves”

As addicts, we may be prone to behaviors and actions that are not in line with spiritual principles. This could simply be described as our hearts and heads are not always aligned. Sometimes it takes years in recovery and working the Steps with a sponsor to improve our skills with spiritual principles such as compassion, acceptance, empathy, and kindness. We may jump to judgment and act in ways that discriminate against others who are not like us, finding reasons to separate ourselves from others. We can ask our sponsor or NA friends for their experience, strength, and hope. In NA, our primary purpose is carrying a message of hope, not one of judgment.

Some of us who have mental health challenges may choose to be careful about the level of detail we go into when we share about our situation in meetings. Rather than sharing in great detail in recovery meetings, we work with our sponsor and trusted NA members on the ways in which our situation affects our recovery. After all, the common denominator for all of us is recovery. One member shared:

“I struggled for years being more ashamed of my mental health condition than I ever was of being an addict. Today I realize that taking care of my mental well-being is a critical part of my overall recovery, and like everything else, the process of doing so is the solution to my struggles.”

Some members may be prone to isolating due to shame, and this is especially true for those of us who suffer from mental health challenges. Many of us are familiar with the saying, “An addict alone is in bad company.” Isolation tends to lead us to dark places, with only our own thoughts to guide us. Sometimes we are caught in a web of negative thinking. In the best circumstances, this type of thinking might inspire us to call our sponsor or a trusted friend or prompt us to go to a meeting. In less desirable circumstances, we might go so far as to entertain thoughts of hurting ourselves. Although it may feel impossible to move from the despair we feel, especially if thoughts of suicide arise, we must ask for help and take action. We need to bring ourselves out of the dark corner and back into living a program of recovery. We have to let go of shame and stigma. For some of us, working with mental health professionals may be necessary if we are going to be able to continue working our program of recovery in NA. As we practice patience and compassion with ourselves, we begin to see a glimmer of hope that helps to shift our thinking; we are embracing our recovery again.

Recovery Happens in NA

Everything we do, everything that matters to us as a Fellowship, comes back to our simple message of hope and freedom. . . . No one is too sick or too well, too rich or too poor, too far gone or too far away to qualify. It is available to us all.

Guiding Principles, “Tradition Five”

All addicts are welcome in NA meetings, and everyone is free to hear NA’s lifesaving message. We gain a sense of belonging when we identify with others in meetings. Being clean, we strive to live in the solution and to practice spiritual principles in all our affairs. This is not accomplished by desire alone; we work with a sponsor, work the Steps, and share our recovery with others. Regardless of our mental health challenges, we are encouraged to practice the principles of recovery in ways that honor our own personal beliefs. The Eleventh Step in *It Works: How and Why* reminds us of “our absolute and unconditional freedom to believe in any Higher Power we choose.” Recovery works for every addict who wants to stop using and is willing to make the effort.

Those of us who suffer from mental health challenges may want to deny our condition and may run the risk of self-deception about our condition. Denial will not serve us. We owe it to ourselves to face our fears with courage and perseverance. One addict with mental health challenges summed up their situation by saying, “If I don’t work on both—recovery and mental health—I won’t be successful with either.” Our work on self-acceptance is crucial not just for our recovery, but also for our mental health. We learn to face life on its own terms.

Service is . . . our unique gift—something that no one can take away from us. We give, and we get. Through service, many of us start on the sometimes long road back to becoming productive members of society.

Just for Today, May 1

Service is a collective action working with others, whether in a group or service committee. We need to reflect honestly on whether we are a good fit for any service position we are considering. This may go beyond whether we simply meet the qualifications for our service positions; we are ready to

objectively assess our abilities and limitations with our sponsor or with another recovering member. This is true for all of us, but might be especially important if our mental health challenges may interfere with our ability to serve well in a particular position. Sometimes, we may find that group-level service is the best fit; other times, we may have confidence due to our life experience that a position on a service committee will work well for us. Through self-awareness and working the Steps with a sponsor and a Higher Power, we can find a place in service to give back regardless of our situation with mental health and medication.

Supporting Each Other

We make the choice to be a positive force in the lives of the people around us. The process of working the steps has given us the ability to love and accept who we are, and become able to truly love others.

In Times of Illness, “Supporting Members with Illness”

One of the ways we support others in NA is through sponsorship. Sponsoring others is a demonstration of gratitude. Whenever we are asked to sponsor a member, we are mindful of the privilege of sponsorship. In sponsoring those whose challenges may differ from ours, we practice unconditional love to support members’ recovery and bridge the gap between isolation and unity, which is all-encompassing. We embrace any member who wants to recover.

We all benefit from empathy, compassionate listening, and support in the Fellowship. Through love, we learn to accept ourselves for who we are. Those of us with mental health challenges appreciate support from other addicts as much as any other member. Supporting each other is unity in action. In NA, we strive to make sure that all have an equal opportunity to recover. Individually and collectively, we can be a beacon of hope and help others find freedom from addiction.

“When Good will supports and motivates both the individual and the Fellowship, we are fully whole and wholly free.” (The Basic Text, *Narcotics Anonymous*, “Our Symbol”) Not all addicts are cut from the same cloth, but our symbol tells us that we have room “for all manifestations of the recovering person.”

Addendum B

Fellowship Intellectual Property Trust and Operational Rules with Recommended Changes Tracked

APPROVED EDITION
REGISTERED 1 JULY 1993
Proposed changes for the 2020 Conference Agenda Report

THE FELLOWSHIP INTELLECTUAL PROPERTY TRUST

**Approved by the Fellowship of Narcotics Anonymous
as given voice by its groups through their regional service representatives
at the World Service Conference on 27 April 1993**

Operational Rules revised by the regional service representatives
at the World Service Conference on 30 April 1997, 27 April 1998, and 1 May 2012

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**INSTRUMENT:
THE FELLOWSHIP INTELLECTUAL
PROPERTY TRUST**

ARTICLE I

Section 1: Name of the Trust

The name of this trust shall be “The Fellowship Intellectual Property Trust.”

Section 2: Creation of the Trust

The Trustor, the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference, does hereby reaffirm and restate its transfer, assignment, and conveyance of all NA recovery literature, trademarks, service marks, and all other intellectual property to Narcotics Anonymous World Services, Inc. as Trustee, to hold and administer in accordance with this Trust document and its purpose.

Section 3: Nature of the Trust

The Trustee shall hold the Trust Properties as a perpetual charitable trust, subject to revocation by the Trustor, and shall use the properties and income derived therefrom exclusively for the charitable and educational purposes described in the statement of purpose below, and for the payment of the incidental expenses and costs of the administration of the Trust.

Section 4: Purpose of the Trust

The sole object and purpose of this Trust is to hold and administer all recovery literature and other intellectual properties of the Fellowship of Narcotics Anonymous in a manner that will help addicts find recovery from the disease of addiction and carry that message of recovery to the addict who still suffers, in keeping with the Twelve Steps and Twelve Traditions of NA.

Section 5: No bond required

The Trustor waives the requirement that the Trustee give a bond to secure performance of the Trustee’s duties.

ARTICLE II: PARTIES TO THE TRUST

The Fellowship of Narcotics Anonymous, as given voice by its groups through their regional delegates at the World Service Conference, is the Settlor and the Trustor. Narcotics Anonymous World Services, Inc. is the Trustee of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust.

ARTICLE III: IDENTITY OF TRUST PROPERTY

The Trust Property includes all recovery literature, trademarks, service marks, copyrights, and all other intellectual property of the Fellowship. From time to time, the Trustor may add to, modify, or delete property from the Trust. All additions made to the Fellowship's recovery literature, trademarks, service marks, copyrights and all other intellectual property by Narcotics Anonymous World Services, Inc. shall additionally be considered property subject to this Trust. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

ARTICLE IV: OPERATIONAL RULES

The Trustor shall generate Trust Operational Rules which shall be controlling on the Trust and the parties thereto except if such Rules conflict with the terms of this Instrument.

ARTICLE V

Section 1: Trustee's duties

The Trustee has the following general duties with respect to administration of the Trust:

1. The Trustee has a duty to administer the Trust according to the Trust Instrument and, except to the extent that this document provides otherwise, according to the statutes of California.
2. The Trustee shall follow written direction given to it from time to time by the Trustor. However, if a written direction would have the effect of modifying the Trust, the Trustee has no duty to follow it unless it complies with the requirements for modifying the Trust herein.
3. The Trustee has a duty to administer the Trust solely in the interest of the Beneficiary and the Trustor.
4. The Trustee has a duty to deal impartially with the Beneficiary.
5. The Trustee has a duty not to use or deal with Trust Property for the Trustee's own profit or for any other purpose unconnected with the Trust, nor to take part in any transaction in which the Trustee has an interest adverse to the Beneficiary or the Trustor.
6. The Trustee has a duty to take, keep control of, and preserve the Trust Property.
7. The Trustee has a duty to make the Trust Property productive.
8. The Trustee has a duty to keep the Trust Property separate from other property not subject to the Trust, and to see that the Trust Property is clearly designated.

9. The Trustee has a duty to take reasonable steps to enforce claims that are part of the Trust Property.
10. The Trustee has a duty to take reasonable steps to defend actions that may result in a loss to the Trust, and to prosecute actions to protect the Trust Property.

Section 2: Delegation of duties

The Trustee shall not delegate to others the performance of acts that the Trustee itself can reasonably be required to perform, and may neither transfer the office of Trustee to another nor delegate the entire administration of the Trust to another entity. All other matters may be delegated, but where the Trustee has properly delegated a matter to an agent, employee, or other person, the Trustee has a duty to exercise reasonable supervision over the person or entity performing the delegated matter.

Section 3: Trustee's standard of care

The Trustee shall administer the Trust with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims to accomplish the purposes of the Trust as determined from the Trust Instrument.

Section 4: Trustee's powers

The Trustee has the following powers: the powers conferred by the Trust Instrument; the powers conferred by statute, except as limited in the Trust Instrument; and the power to perform any act that a Trustee would perform for the purposes of the Trust under the Trustee's standard of care, except as limited in the Trust Instrument. The exercise of a power by the Trustee is subject to the Trustee's fiduciary duties to the Beneficiary and the Trustor. Under this document, the Trustee has the following powers:

1. The power to collect, hold, and retain Trust Property.
2. The power to receive additions of property to the Trust.
3. The power to participate in the operation of any business that is part of the Trust, and to change the legal form of the business.
4. The power to manage and control Trust Property, and to manage, control, and divide proceeds and assets generated from the manufacture or sale of products derived from Trust Property.
5. The power to encumber, mortgage, or pledge any portion of the Trust Property except those copyrights, trademarks, and service marks held by the Trust.
6. The power to enter into a lease for any purpose.
7. The power to insure the Trust Property against damage or loss and to insure the Trustee against third-party liability.
8. The power to prudently borrow money for any Trust purpose, to be repaid from proceeds from the sale of products generated from Trust Property.

9. The power to pay, contest, or settle claims against the Trust by compromise, arbitration, or otherwise, and the additional power to release in whole or in part any claim belonging to the Trust.
10. The power to pay taxes, assessments, reasonable compensation of the Trustee and of employees and agents of the Trust, and other expenses incurred in the collection, care, administration, and protection of the Trust.
11. The power to hire people, including accountants, attorneys, auditors, investment advisors, or other agents, even if they are associated or affiliated with the Trustee, to advise or assist the Trustee in the performance of administrative duties.
12. The power to execute and deliver all instruments which are needed to accomplish or facilitate the exercise of the powers vested in the Trustee.
13. The power to prosecute or defend actions, claims, or proceedings for the protection of the Trust Property and of the Trustee in the performance of the Trustee's duties.¹

Section 5: Limitation

The Trustee is not granted the power to make loans to the Beneficiary either out of Trust Property or out of proceeds from the sale of products generated from Trust Property, or to guarantee loans to the Beneficiary by encumbrances on either Trust Property or proceeds from the sale of products generated from Trust Property.

Section 6: Indemnification of Trustee

To the fullest extent permitted by law, the Trustor shall indemnify the Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in that code section, and including an action by or in the right of the Trustee, by reason of the fact that the person is or was a person described in that code section. Procedures for the approval of indemnity, advancement of expenses, and insurance shall be described in the Trustee's bylaws.

The Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, may not be relieved of liability for breach of Trust committed intentionally, with gross negligence, in bad faith, or with reckless indifference to the interests of the Beneficiary or the Trustor, or for any act wrongfully consented to by the Beneficiary or the Trustor.

¹ For details, see page 15, "Protection of Trust Properties."

Section 7: Nonpartisan activities by the Trustee

The Trustee shall be nonprofit and nonpartisan. No part of the activities of the Trustee shall consist of the publication or dissemination of materials with the purpose of attempting to influence legislation, and the Trustee shall not participate or intervene in any political campaign on behalf of any candidate for public office or for or against any cause or measure being submitted to the people for a vote.

ARTICLE VI: REVOCABILITY

This Trust is revocable by the Trustor.

ARTICLE VII: TERMINATION

This Trust will terminate when any of the following occurs:

1. The Trust purpose is fulfilled;
2. The Trust purpose becomes unlawful;
3. The Trust purpose becomes impossible to fulfill; or
4. The Trustor revokes the Trust.

On termination of the Trust, the Trustee continues to have the powers reasonably necessary under the circumstances to wind up the affairs of the Trust. On termination of the Trust, the Trust Property is to be disposed of as determined by the Trustor. If no such determination is made, the Trust Property shall be transferred to the Trustor.

ARTICLE VIII: JURISDICTION

The Superior Court of the State of California has exclusive jurisdiction of proceedings concerning the internal affairs of the Trust, and has concurrent jurisdiction over actions and proceedings to determine the existence of the Trust, actions and proceedings by or against creditors or debtors of the Trust, and actions and proceedings involving the Trustee and third persons, in accordance with California Probate Code Section 17000.

There is no right to a jury trial in proceedings under the California Probate Code concerning the internal affairs of the Trust.

ARTICLE IX: TRUST REGISTRATION

The Trustee shall register the Trust document with the California Attorney General, and shall perform all obligations attendant thereto.

The instrument was signed by Vivienne Long, RSR, San Diego-Imperial Region, designated signator for the Trustor; K. Joseph Gossett, Executive Director, WSO, Inc., Trustee; and Mary Kay Berger, Chairperson, Board of Directors, WSO, Inc., Trustee. It was registered with the Attorney General for the State of California, USA, on 1 July 1993.

**OPERATIONAL RULES:
THE FELLOWSHIP INTELLECTUAL
PROPERTY TRUST**

**ARTICLE I:
BACKGROUND, PURPOSE,
AND PARTIES OF THE TRUST**

SECTION 1: BACKGROUND OF THE TRUST

The foundation for the Fellowship Intellectual Property Trust was laid, in fact, at the 1st World Convention of Narcotics Anonymous, held November 5, 1971, in La Mirada, California, USA. At that convention, the membership of the Fellowship of Narcotics Anonymous directed its World Service Board of Trustees to establish a World Service Office to serve as a central Fellowship contact point, an NA information clearinghouse, and NA's publishing agency. Since that time, the World Service Office has been the Narcotics Anonymous Fellowship's authorized publisher, holding the Fellowship's intellectual property in trust as a fiduciary of the Fellowship's primary service arms, the World Service Board of Trustees (through 1976) and the World Service Conference (from 1976 to the present).

The WSO's (known as Narcotics Anonymous World Services, Inc. (NAWS) since 1998) role as Fellowship publisher has been described in every approved NA service manual, from the first edition of *The NA Tree* (1975) to the most recent edition of *A Guide to World Services in NA*, as follows: "[Another] major function of WSO is the publication and distribution of literature, which includes the printing, warehousing, and distribution of all existing literature."

On 15 September 1982, the trust relationship was reinforced when the WSC Literature Committee specifically conveyed the copyright to the book *Narcotics Anonymous*, NA's Basic Text, to World Service Office, Inc., such specific trust to be administered in accordance with the direction of the World Service Conference as given at its annual meeting of 5–9 May 1982.

In 1988, the trust relationship was further reinforced when the World Service Conference approved guidelines for the WSC Literature Committee which read, in part: "After the World Literature Committee has completed its work on a piece of literature, it is turned over to the World Service Office for production and distribution. Production involves copyright registration... Literature is then sold through WSO."

Finally, in 1991, the World Service Conference reaffirmed the trust relationship that had been established over the years between the Fellowship of Narcotics Anonymous, the World Service Conference, and World Service Office, Inc. This was accomplished by the approval of motions which read as follows:

To reaffirm and ratify that the ownership of all of NA's intellectual and physical properties prepared in the past, and to be prepared into the future, is held by WSO, Inc., which holds such title in trust on behalf of the Fellowship of Narcotics

Anonymous as a whole, in accordance with the decisions of the World Service Conference.

To reaffirm that the World Service Office, Inc., is the exclusive publisher and distributor of all World Service Conference-approved literature, including all books, pamphlets, handbooks, and other intellectual and physical properties, as directed by the Fellowship of Narcotics Anonymous through the World Service Conference.

The World Service Office Board of Directors is entrusted with the responsibility for protecting the Fellowship's physical and intellectual properties, including the Basic Text, and at the [discretion of the] Board of Directors... shall take legal action to protect those rights against any and all persons who choose to infringe upon this literature trust.

At the World Service Conference in 1997, the name “regional service representative” was changed to “regional delegate”. At the World Service Conference in 1998, the name of the legal entity “World Service Office, Inc.” was changed to “Narcotics Anonymous World Services, Inc.” (NAWS). The directors of Narcotics Anonymous World Services, Inc. are referred to as World Board members. These name changes are reflected in this document except when used in a historical context.

SECTION 2: PURPOSE OF THESE RULES

These rules describe the way the Fellowship Intellectual Property Trust is to be administered. They describe the intellectual properties held by the Trust, the parties to the Trust, the rights and responsibilities of each of those parties, and the relationship between them. They also describe specific means by which the rights and responsibilities of the Trustee can be revoked and reassigned, and the procedure to be used in altering specific provisions of the Trust Instrument itself.

SECTION 3: PARTIES OF THE TRUST

Trustor: The Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference

Equitable ownership of the recovery literature, trademarks, service marks, and all other intellectual properties of the Fellowship of Narcotics Anonymous resides with the Fellowship itself, the basic collective unit of which is the NA group. Decisions concerning NA's intellectual properties directly affect each individual NA group as well as NA as a whole. For this reason, such decisions are made by the duly authorized representatives of the NA groups, their regional delegates, when those RDs gather at NA's World Service Conference. By such means, the Fellowship of Narcotics Anonymous acts as the Trustor of the Fellowship Intellectual Property Trust and is responsible for the creation, approval, revision, and decommissioning of NA recovery literature, trademarks, service marks, and other intellectual properties. The Trustor's specific rights and responsibilities are detailed in Article III of these rules and in the currently applicable service manuals.

Trustee: Narcotics Anonymous World Services, Inc.

Narcotics Anonymous World Services, Inc. is the Trustee of the Fellowship Intellectual Property Trust, responsible to hold, register, use, and protect the licenses, copyrights, trademarks, service marks, and other intellectual properties composing the Trust Property. The Trustee is responsible to use or regulate the use of those intellectual properties in a manner consistent with the instructions of the Trustor in service to the Beneficiary, the Fellowship of Narcotics Anonymous as a whole. The Trustee's specific rights and responsibilities are detailed in Article IV of these rules.

Beneficiary: the Fellowship of Narcotics Anonymous as a whole

The Beneficiary of the Fellowship Intellectual Property Trust is the Fellowship of Narcotics Anonymous as a whole. The Beneficiary's specific rights and responsibilities are detailed in Article V of these rules.

ARTICLE II: INTELLECTUAL PROPERTIES HELD IN TRUST

SECTION 1: TWELVE STEPS, TWELVE TRADITIONS

By license agreement with Alcoholics Anonymous World Services, Inc., the Trust holds all rights to the Twelve Steps and Twelve Traditions as adapted for use by the Fellowship of Narcotics Anonymous, listed in Schedule A of these rules.

SECTION 2: OTHER RECOVERY LITERATURE

By assignment from the Trustor, the Trust holds all other recovery literature created directly or indirectly by the Trustor, the Beneficiary, and/or the Trustee. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

SECTION 3: TRADEMARKS, SERVICE MARKS

Trademarks and service marks held by the Trust include, but are not necessarily limited to, the name "Narcotics Anonymous," the stylized NA initials in a double circle, the four-sided diamond enclosed in a circle touching all four of its points, and the original NA group logo. The Trust holds legal title to such marks and all translated, adapted, and hybrid forms of such marks.

SECTION 4: COPYRIGHTS

The Trust holds legal title to the copyrights for all books, booklets, pamphlets, and audio and/or video recordings, both in original and in translation, that have been approved by the World Service Conference or its predecessors. The Trust holds legal title to the copyrights for all literary works in progress, both in original and in translation, developed by the World Service Conference, its boards, and its committees.

SECTION 5: NATURE OF OWNERSHIP OF THE TRUST'S COPYRIGHTED RECOVERY LITERATURE

The creation of all new or revised Trust literary properties will be commissioned by the Trustor, either directly or through a subordinate board or committee of the World Service Conference. The process used to create those properties, from commencement to conclusion, will be under the constant control of the Trustor, exercised directly or by ~~a subordinate board or committee of the World Service Conference~~the World Board. The Trustor authorizes the Trustee to make non-substantive corrections to Trust literary properties as those needs arise and to create enhanced electronic or digital versions of texts that include supplemental material or connections to other NA materials, so long as the Trustee provides not less than 120 days prior notice of such proposed corrections or enhancements to the fellowship.² Individuals who take part in the creation of those properties will do so as employees of either the Trustor or the Trustee, whether salaried or volunteer, with full knowledge of the commissioning and controlling interests of the Trustor. No individual participant in any project designed to create or revise Trust recovery literature will retain any claim of copyright with respect to their contributions thereto. The ownership of these Trust Properties will be registered in the name of the Trustee.

² The actual language adopted at WSC 2012 reads:

To allow the World Board to make non-substantive corrections to Fellowship Approved literature which do not impact the original meaning of the Fellowship Approved text and which fix typographical errors, obsolete references, references to outdated literature, and other similar corrections. The World Board will announce such corrections not less than 120 days in advance of publication.

To allow the World Board the ability to create and approve enhanced electronic or digital versions of texts that include supplemental materials or connections to other NA materials. The World Board will announce such enhancements not less than 120 days in advance of publication.

**ARTICLE III:
RIGHTS AND RESPONSIBILITIES
OF THE TRUSTOR**

SECTION 1: GENERAL RIGHTS AND RESPONSIBILITIES

The Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at NA's World Service Conference, as Trustor, has sole authority to approve any proposed revision of the NA Fellowship's adaptation of the Twelve Steps and Twelve Traditions. The Trustor and its designated agents have sole authority to commission, direct, and approve the creation and revision of books, booklets, and informational pamphlets for and on behalf of the NA Fellowship. The Trustor and its designated agents have sole authority to create or revise trademarks and service marks for and on behalf of the NA Fellowship.

SECTION 2: WSC BOARDS AND COMMITTEES

The World Service Conference of Narcotics Anonymous accomplishes its tasks, including those tasks having to do with the Trust, through ~~subsidiary boards and committees~~the World Board, which has oversight of the activities of Narcotics Anonymous World Services, Inc. The conference may dissolve existing boards and committees and create new boards and committees. ~~The conference World Service Conference may select the leadership and composition~~elects the members of the World Board, and may ~~of its boards and committees. The conference may~~ delegate portions of its authority to ~~its subsidiary~~the World B~~boards and committees.~~ However, in all matters and at all times, ~~these boards and committees are~~the World Board is subject to the direction of the World Service Conference.

The specific purpose, function, authority, and composition of the World Board each ~~of the conference's standing subsidiary boards and committees,~~ and the relationship between ~~them~~the World Board and the conference, is described in the relevant guidelines and handbooks approved by the World Service Conference. ~~The conference regulates its ad hoc committees through motions passed at its biennial meeting, recorded in its minutes.~~

**SECTION 3: ADDITION, REVISION, OR DELETION
OF PROPERTIES FROM THE TRUST BY THE TRUSTOR**

The Trustor may add properties to the Trust, delete properties from the Trust, or revise the content or nature of Trust Properties by the following means:

1. Proposals must be distributed to the NA groups via their regional delegates no less than ninety days prior to the biennial meeting of the World Service Conference at which the proposals will be considered.
2. For such a proposal to be approved, two-thirds of the regional delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal.

**ARTICLE IV:
RIGHTS AND RESPONSIBILITIES
OF THE TRUSTEE**

SECTION 1: IDENTIFICATION OF TRUSTEE

Narcotics Anonymous World Services, Inc. a California nonprofit public benefit corporation, is Trustee of the Fellowship Intellectual Property Trust. Its bylaws are filed with the California Secretary of State.

SECTION 2: GENERAL RESPONSIBILITIES FOR TRUST PROPERTIES

The Trustee shall hold in a fiduciary capacity the right to control and use all Trust Properties, and specifically to manufacture and sell products generated from Trust Properties, so long as the Trustee's actions are not inconsistent with the directions of the Trustor.

SECTION 3: FIDUCIARY RELATIONSHIP TO TRUSTOR

The Trustee is a service entity which functions within the totality of the Fellowship of Narcotics Anonymous and, in so doing, endorses the aims, goals, and purposes of the Fellowship. The Trustee, including its members, officers, and employees, is and shall be subject to, and will abide by, the principles of the Twelve Traditions of Narcotics Anonymous as set forth in the book *Narcotics Anonymous*.

Further, the Trustee shall abide by motions adopted by the Trustor at each World Service Conference meeting, and shall implement decisions reached by the Trustor as they pertain to the administration of the Trust. This applies even to decisions reached by the Trustor which have the effect of modifying either the Trust Operational Rules or the Trust Instrument, provided those decisions are reached in a way that is consistent with Article VII of these Rules. It is herein specifically acknowledged that the Trustee acts as a fiduciary in its dealings with and on behalf of the Trustor.

SECTION 4: TRUSTEE COMPENSATION

Board members and officers of the corporation serving as Trustee shall serve without compensation, but may be reimbursed for expenses they incur in their service to the Trust.

No board member, officer, employee, or other person connected with the Trustee, or any other private individual, shall receive at any time any of the net earnings or pecuniary profit generated by the Trust; provided, however, that this provision shall not prevent payment to any such person of reasonable compensation for services rendered to or for the Trustee in furtherance of its purposes.

SECTION 5: REGISTRATION OF TRUST PROPERTIES

The Trustee shall take all reasonable measures to register and protect the Trust's copyrights, trademarks, and service marks, both in their original forms and in their translated, adapted, or hybrid forms, in the United States and other countries where

those properties are used or are likely to be used, in accordance with the provisions of United States law and all applicable international intellectual property rights treaties.

SECTION 6: MANUFACTURE, DISTRIBUTION, AND SALE OF PRODUCTS

The Trustee shall use, produce, print, manufacture, and/or reproduce products using Trust Properties, and shall offer such products for sale to the Beneficiary and the general public. The Trustee may enter into appropriate agreements and arrangements with third parties regarding the manufacture, distribution, and sale of products using Trust Properties.

SECTION 7: TRUSTEE AUTHORITY WITHOUT NOTICE OR PERMISSION

In the absence of the Trustor's specific direction to the contrary, the Trustee may make the following decisions relative to administration of the Trust without prior notice to or permission of the Trustor:

1. The Trustee has complete discretion as to the manufacturing format of products generated from Trust Properties, including appearance, design, typeface, paper grade, binding, cover, ink, or other material.
2. The Trustee has complete discretion in the management of all affairs related to the perpetuation of the Trust's business, including contracts, leases, licenses, covenants, manufacturing specifications, inventory and production quantities, distribution and marketing policies and programs, and pricing of products generated from Trust Properties.
3. The Trustee has the complete discretion to make non-substantive corrections to Trust literary properties as those needs arise. *(see footnote 2, page 10)*
4. The Trustee has the authority to bundle, excerpt, and repackage Trust Properties.³
5. The Trustee has complete discretion to create enhanced electronic or digital versions of Trust Properties that include supplemental materials and connections to other fellowship materials. *(see footnote 2, page 10)*

³ The actual language adopted at WSC 2012 reads:

To allow the World Board to bundle, excerpt, and repackage Fellowship Approved literature without changes to the texts themselves. The World Board will announce these actions not less than 120 days in advance of publication.

SECTION 8: TRUSTEE OBLIGATION FOR NOTICE AND APPROVAL

Other than alterations that consist of non-substantive corrections, bundling, excerpting, and/or repackaging, or enhanced electronic versions of Trust Properties, the Trustee must notify the Trustor at least ninety days prior to any given biennial World Service Conference meeting of the Trustee's intent to publish or otherwise manufacture a product based on an alteration of any Trust Property. The Trustee may not publish or manufacture such a product prior to receiving the Trustor's approval at that biennial meeting. For such a proposal to be approved, two-thirds of the regional delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal. Where an alteration consists of a non-substantive correction, bundling, excerpting or repackaging, or an enhanced electronic version of Trust Properties, the Trustee shall provide not less than 120 days prior written notice to the Trustor of its intent to publish that product. *(See footnote 2, page 10 and footnote 3, page 13)*

SECTION 9: UTILIZATION OF REVENUES

From the revenues accruing from licenses, covenants, or sale of products generated from Trust Properties, the Trustee shall provide services as directed by the World Service Conference, including but not limited to the following:

1. The Trustee shall provide administrative, organizational, and logistical services to the World Service Conference of Narcotics Anonymous and the Fellowship of Narcotics Anonymous at large.
2. The Trustee shall provide service to individual addicts and groups of addicts seeking recovery from addiction, and shall assist the general public in understanding addiction and the Narcotics Anonymous program for recovery from addiction. Such assistance may include direct and indirect communication with addicts, organizations, agencies, governments, and the public at large.
3. The Trustee shall publish and distribute periodicals written or prepared by and/or for the World Service Conference.
4. The Trustee shall not utilize revenues generated from Trust Properties to engage in any activities or exercise any powers that are not in furtherance of the primary purpose of Narcotics Anonymous, which is to carry the NA message to the still-suffering addict.

SECTION 10: DISBURSEMENT OF TRUST REVENUE

The Trustee shall hold and manage in a fiduciary capacity the income produced by any of the activities described in Article IV, Sections 6 and 9, of these Rules in such a manner as to further the purpose described in Article I, Section 4, of the Trust Instrument.

SECTION 11: PROTECTION OF TRUST PROPERTIES

The Trustee shall have the duty and authority to protect the Trust Properties from infringement. The Trustee will utilize the following process to proceed with protection of the Trust Properties.

1. Before legal proceedings are initiated, the Trustee will request that all infringing parties cease and desist their infringement.
2. The Trustee will seek to resolve the infringement prior to filing formal litigation.
3. Prior to filing suit, at least three-quarters of the board members of Narcotics Anonymous World Services ~~corporation, Inc.~~ must approve the action.
4. Prior to filing, the Trustee will report to all World Service Conference participants its intent to file infringement suit, unless the provision of such a report would demonstrably impair the Trustee's ability to effectively protect Trust Property. In the event that prior notice of intention to protect the intellectual properties of the Trust would jeopardize the success of any action, appropriate provisions or remedies such as injunctions and seizure orders may be sought without prior notice.
5. Once filed, settlement of infringement litigation shall be at the discretion of the Trustee.

SECTION 12: TRUSTEE REPORTING OBLIGATION

Each year, the Trustee shall give a full written report of its activities to the Trustor. This report shall be delivered to all participants of the World Service Conference at or before its biennial meeting, and shall be available at cost or less to any Narcotics Anonymous member. This report shall include:

1. A year-end financial report of the previous ~~calendar~~-fiscal year.
2. A description of all Trustee activities funded from proceeds generated by the Trust in the previous year.
3. A budget and project description for Trustee activities planned for the coming conference cycle.

An audit of the Trust for the previous fiscal year will be provided, upon completion, to all participants of the World Service Conference as Trustor. This audit shall be performed by an ~~n independent~~-certified public accountant. Additionally, the Trustor may elect to instruct the Trustee to perform a review of operational practices and policies, above and beyond the review of internal controls and procedures which is conducted annually.

**ARTICLE V:
RIGHTS AND RESPONSIBILITIES
OF THE BENEFICIARY**

SECTION 1: FELLOWSHIP USE OF TRUST PROPERTIES

Use of NA's copyrights, trademarks, and service marks by NA groups, service boards, and committees is covered in a separate document called "Internal Use of NA Intellectual Property."

SECTION 2: BENEFICIARY IMPACT ON THE TRUST

The Beneficiary may take part in decisions affecting the Trust through the established Narcotics Anonymous service structure as described in the most recent Narcotics Anonymous service manual.

SECTION 3: INSPECTION OF TRUSTEE ACTIVITIES

The Fellowship of Narcotics Anonymous, as given voice by its groups through their regional delegates at the World Service Conference, is the Settlor and the Trustor of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. Only the Trustor can request and conduct an inspection of Trustee activities on behalf of the Trust Beneficiary. With the exception of any subject and items excluded by law, there are no limitations on what the Trustor can inspect.

Under Article IV, Section 12 of the Operational Rules, and consistent with California law, Narcotics Anonymous World Services, as Trustee, is required to, among other things: (1) give a year-end financial report of the previous fiscal year; (2) cause an audit to be performed by an independent certified public accountant of the Trust for the previous fiscal year; and (3) deliver a copy of both the financial reports and independent audit to all participants of the World Service Conference.

If, after a review of the financial reports and independent audit, a member or service body has questions or concerns, they can contact the World Board. If questions or concerns still remain after contacting the World Board, they would then be discussed through the established Narcotics Anonymous service structure. This discussion would be initiated by any region, through its regional delegate, submitting a request by motion to the Trustor, at the World Service Conference, through the *Conference Agenda Report*.

Conditions of inspection

~~Any regional service committee or equivalent service body may inspect the records and operations of the Trust on behalf of the Beneficiary, provided the following conditions are met:~~

- ~~1. A motion to conduct an inspection of the Trust must be approved by a regional service committee or its equivalent.~~

- ~~2. The regional service committee wishing to inspect the Trust must assume the expense associated with the participation of its own representative in the inspection. All other costs associated with the inspection shall be borne by the Trustee.~~
- ~~3. The regional service committee must present a written request for inspection of the Trust, detailing its concerns and any particular areas of Trust operations it wishes to inspect.~~

~~Selection of inspection team~~

- ~~1. The regional service committee requesting the inspection will select two members of the World Board for inclusion on the inspection team. These two members will facilitate the inspection.~~
- ~~2. The regional service committee requesting the inspection will designate one of its participants to be included on the inspection team.~~

~~Inspection limitation~~

~~A Trust inspection conducted by a regional service committee on behalf of the Beneficiary may examine any aspect of the Trustee's operations, including all records, with the exception of documents privileged by law, including but not limited to the Trustee's personnel records.~~

~~Report of inspection~~

- ~~1. One of the two inspection team members drawn from the World Board will develop a report of the team's findings relative to the region's stated concerns. The report will include full documentation of the inspection team's findings.~~
- ~~2. The final report, along with a copy of the original request for inspection, will then be published in the next *Conference Report*.~~

ARTICLE VI:
REVOCATION AND REASSIGNMENT OF THE
TRUSTEE'S RIGHTS AND RESPONSIBILITIES

SECTION 1: CONSIDERATION OF REVOCATION

The Trustee's rights and responsibilities may be revoked and reassigned to another party by the Trustor, provided the following conditions are met:

1. A written petition to revoke the rights and responsibilities of the Trustee must be submitted to the World Service Conference. To be considered, the petition must meet one of the following conditions:
Either the petition must be signed by a third of the regional service committees recognized as voting participants in the most recent biennial meeting of the World Service Conference,
Or the petition must be signed by the World Board, the motion to submit such a petition having been approved by no less than two-thirds of the members of the World Board.
2. In order to be considered at any given biennial meeting of the World Service Conference, such a petition must be received between 1 June and 31 December of the previous year, allowing time for the petition to be distributed to Conference participants.
3. If the above criteria are met, the petition will be placed on the agenda of the next biennial meeting of the World Service Conference. Statements of the petitioners will be published with the petition itself in the *Conference Agenda Report*.

SECTION 2: REVOCATION PROCESS

1. A majority of regional delegates must approve before proceeding with the revocation process.
2. An ad hoc committee will be appointed. The committee will consist of the following:
 - a. four regional delegates
 - b. the chairperson and three members of the World Board, one of whom will chair the committee
3. This committee will hold two forums during the upcoming conference cycle to receive Fellowship input, and will provide accounts of those forums in the *Conference Report*.
4. In addition to those forums, the committee will meet at least twice, and will provide accounts of its meetings in the *Conference Report*.
5. At the conclusion of its study, this committee will prepare a written report to be included in the *Conference Agenda Report*, along with any motions or recommendations related to the proposed revocation.
6. Any motion to revoke the Trustee's rights and responsibilities arising from the committee's study will require approval of two-thirds of the regional delegates recorded as present in the WSC roll call immediately prior to the vote.

SECTION 3: REASSIGNMENT OF TRUSTEE RESPONSIBILITIES

Should the Trustee's rights and responsibilities be revoked, the Trustor will immediately direct the Trustee to assign those rights and responsibilities either to the Trustor or to the entity the Trustor wishes to administer the Trust. The Trustee shall comply immediately with such direction.

**ARTICLE VII:
REVISION OF TRUST RULES AND INSTRUMENT**

SECTION 1: REVISION OF TRUST OPERATIONAL RULES

The Trust Operational Rules may be revised by the “yes” vote of two-thirds of those regional delegates recorded as present in the World Service Conference roll call immediately prior to the vote.

SECTION 2: REVISION OF TRUST INSTRUMENT

Provisions of the Trust Instrument may be changed only under the following conditions:

1. Any motion to review proposed revisions to the Trust Instrument must receive the approval of a majority of regional delegates at the World Service Conference.
2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the *Conference Agenda Report* for adoption.
3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of “yes” from two-thirds of those regional delegates recorded as present in the World Service Conference roll call immediately prior to the vote.

**SCHEDULE A:
TWELVE STEPS AND TWELVE TRADITIONS, AS
ADAPTED FOR USE BY THE FELLOWSHIP OF
NARCOTICS ANONYMOUS**

License to adapt the Twelve Steps and Twelve Traditions for use by the Fellowship of Narcotics Anonymous granted by Alcoholics Anonymous World Services, Inc.

TWELVE STEPS

1. We admitted that we were powerless over our addiction, that our lives had become unmanageable.
2. We came to believe that a Power greater than ourselves could restore us to sanity.
3. We made a decision to turn our will and our lives over to the care of God *as we understood Him*.
4. We made a searching and fearless moral inventory of ourselves.
5. We admitted to God, to ourselves, and to another human being the exact nature of our wrongs.
6. We were entirely ready to have God remove all these defects of character.
7. We humbly asked Him to remove our shortcomings.
8. We made a list of all persons we had harmed, and became willing to make amends to them all.
9. We made direct amends to such people wherever possible, except when to do so would injure them or others.
10. We continued to take personal inventory and when we were wrong promptly admitted it.
11. We sought through prayer and meditation to improve our conscious contact with God *as we understood Him*, praying only for knowledge of His will for us and the power to carry that out.
12. Having had a spiritual awakening as a result of these steps, we tried to carry this message to addicts, and to practice these principles in all our affairs.

TWELVE TRADITIONS

1. Our common welfare should come first; personal recovery depends on NA unity.
2. For our group purpose there is but one ultimate authority—a loving God as He may express Himself in our group conscience. Our leaders are but trusted servants; they do not govern.
3. The only requirement for membership is a desire to stop using.
4. Each group should be autonomous except in matters affecting other groups or NA as a whole.
5. Each group has but one primary purpose—to carry the message to the addict who still suffers.
6. An NA group ought never endorse, finance, or lend the NA name to any related facility or outside enterprise, lest problems of money, property, or prestige divert us from our primary purpose.
7. Every NA group ought to be fully self-supporting, declining outside contributions.
8. Narcotics Anonymous should remain forever nonprofessional, but our service centers may employ special workers.
9. NA, as such, ought never be organized; but we may create service boards or committees directly responsible to those they serve.
10. Narcotics Anonymous has no opinion on outside issues; hence the NA name ought never be drawn into public controversy.
11. Our public relations policy is based on attraction rather than promotion; we need always maintain personal anonymity at the level of press, radio, and films.
12. Anonymity is the spiritual foundation of all our traditions, ever reminding us to place principles before personalities.

READER'S NOTES**INTRODUCTION**

Who says NA literature is *NA* literature? Who “owns” NA’s literature and logos? Who may print and distribute our White Booklet, our Basic Text, our Daily Book, our IPs? What is done with the money paid for NA literature? How is that money accounted for? And what can we do if it’s used improperly? The answers to these questions form the substance of the Fellowship Intellectual Property Trust.

The purpose of the Fellowship Intellectual Property Trust is to lay out the collective decisions the Narcotics Anonymous Fellowship has made over the years concerning its literature and logos. Anyone who has any questions about how NA literature is to be developed and approved, who “owns” it, how it may be changed and who may change it, who may print it, and what is to be done with the money resulting from its sale can easily refer to the Fellowship Intellectual Property Trust. In this one comprehensive document appear the policies our entire fellowship has created to preserve the integrity of its published message and the accountability of its publishing services.

These policies have been cast as a legal document, a “trust.” This has been done, in part, because US law and international treaty regulate the way “intellectual property”—copyrights, trademarks, and other creations of the mind or spirit—should be administered. The legal “trust” framework has been used because it fits the relationship established in Narcotics Anonymous between the fellowship and its service bodies where NA literature and logos are concerned.

The intent of the trust is to provide assurance to our present and future membership that NA’s properties are duly protected from misuse by anyone, including our world services. The trust clarifies and limits Narcotics Anonymous World Services’ responsibility and authority in administering those properties on the fellowship’s behalf. NA’s literature and logos belong to no one individual, board, or committee, but are held in trust for the Fellowship of Narcotics Anonymous as a whole. By casting the policies affecting this arrangement as a registered legal document, we ensure that those policies can be enforced, if need be, by the California state government.

TRUST INSTRUMENT

The first of the Trust document's two parts is the legal "Trust Instrument" which is filed with the California attorney general. The instrument describes the relationship between the NA Fellowship, the fellowship's ~~representatives~~delegates meeting at the World Service Conference, and Narcotics Anonymous World Services, Inc. in the manner required in registering a charitable trust in California.

ARTICLE I

What "incidental expenses and costs of... administration" are anticipated?

These are the costs that were originally associated with creating the Trust: normal filing fees incurred in registering the trust instrument, attorney's fees for registration and amplification of applicable copyright and trademark registrations, and other incidental costs.

ARTICLE II: PARTIES TO THE TRUST

This article of the trust instrument briefly identifies the three parties of the Fellowship Intellectual Property Trust according to the relations that have developed over the years in Narcotics Anonymous services. Through their regional delegates, the NA groups make decisions at the World Service Conference about the development, approval, and publication of literature on behalf of the entire NA Fellowship. Once those decisions are made, the approved literature is given in trust to Narcotics Anonymous World Services, Inc., which is expected to publish it in accordance with the directions the fellowship's representatives give it. The literature is created and published to benefit the Fellowship of Narcotics Anonymous as a whole in fulfilling its primary purpose: "to carry the message to the addict who still suffers." In legal trust terminology, this makes the NA Fellowship, through its RDs, the *Trustor*, Narcotics Anonymous World Services, Inc. the *Trustee*, and the NA Fellowship, as a whole, the *Beneficiary*.

ARTICLE III: IDENTITY OF TRUST PROPERTY

What is meant by "modify or delete property"?

This refers to the fellowship's ability, as trustor, to revise existing NA literature and/or remove an item from the classification of approved NA literature.

What about coffee cups, the Basic Journal, and other such products?

Coffee cups, chips and medallions, desks, chairs, and computers are all physical properties of the NAWS corporation. However, any trademarks displayed on those properties are specifically subject to the rules of use described in the intellectual property trust.

ARTICLE IV: OPERATIONAL RULES

This article refers to the Trust Operational Rules. Are the rules separate from the Trust in some way? Aren't they registered as part of the Trust with the attorney general?

Because we are talking about “legal stuff,” we need to use our terms in a very precise way here. The *Trust* is a legal *arrangement*; it is not any of the documents associated with it. Both the trust *instrument* and the trust *operational rules* are meant to describe how the Trust works—each, however, speaks to a different audience. The trust instrument, describing the basic legal framework of the arrangement, is written to tell the government that we are settling our intellectual property affairs in a particular order recognizable to the courts. The operational rules serve as our fellowship's internal agreement about the details of the trust's actual administration. The trust instrument is like the articles of incorporation of the trust, and the rules are like its bylaws or guidelines. While only the instrument *must* be registered with the attorney general, the rules are also filed for information purposes. Further, Article IV of the instrument links the operational rules to the trust in such a way that, once the instrument is registered, the rules also become legally binding on all parties of the trust.

ARTICLE V: TRUSTEE

In Section 1, Item 6, what is meant by “take, keep control of, and preserve”?

This means that the trustee (NAWS, Inc.) has the duty to receive from the fellowship any intellectual properties that the fellowship decides are to be included in the trust. The trustee must then properly register its possession of the property, preserve it in its original form, use it in the way described in the instrument and rules, and take steps to ensure that others do not misuse the intellectual properties.

In Section 1, Item 7, what is meant by “make the trust property productive”?

The trustee must make the trust property available in some useful form to those who would benefit from it—namely, the NA Fellowship as a whole.

In Section 2, what is meant by “all other matters may be delegated”? What are some examples of acts delegated to others?

The trustee may delegate *portions* of its duties—for instance, it may contract with an attorney to register copyrights for certain trust properties—given reasonable supervision by the trustee. However, the trustee may never transfer or delegate to another entity the *whole* of its administrative duties. The trustee may hire an attorney to represent its interests in a court of law; it may charge an employee with the responsibility to account for the income of trust properties; it may appoint someone to negotiate a business deal on its behalf. However, the trustee may *not* ask someone else to take over the role of trustee itself—at least not on its own authority. Only the trustor can reassign all the rights and responsibilities of the trustee to another party (see the rules, Article VI).

Section 3 seems arbitrary. Why has it been included?

This section could really be labeled the trustee's "oath of office," and it is far from arbitrary. The language in this section has been very carefully crafted and is based on extensive California experience in defining the way in which a trustee can effectively be held accountable. Such a statement of the standard of care the trustee is to be held to is required by California trust law.

In Section 4, what are some examples of "powers conferred by statute"?

As with so much of the language included in the trust instrument, the lead to this section is taken directly from the California Probate Code division on trust law, Section 16200. The specifics are drawn from other sections of the code that describe the powers of trustees (Sections 16201, 16202, 16220-21, 16223-49).

In Section 4, can you clarify some of the powers listed?

While the "legalese" language found in these items is sure to be unfamiliar to most of our members, it is very common to these types of legal documents. We will try to clarify the particular points as best we can.

Item 3. *How could "the legal form of business" be changed?* This item is phrased as if the trustee's corporation—Narcotics Anonymous World Services, Inc.—were being set up at the same time as the trust. Item 3 gives NAWS, Inc. the authority to set up and incorporate a business enterprise so that it can fulfill the rights and responsibilities described in Article IV of the operational rules (print, warehouse, and distribute NA literature, etc.). It also gives NAWS, Inc. the authority to modify the way in which the business is set up if such is found to be necessary for the fulfillment of its responsibilities as trustee. (For more on "legal forms of business," see the glossary at the back of this handbook.)

Item 4. *What is meant by "manage and control"?* This item gives the trustee (NAWS, Inc.) the responsibility to properly register, protect, and regulate the use and licensing of the trust properties themselves—that is, the copyrights to NA literature and the registrations of our trademarks and service marks. It also gives the trustee the authority to put whatever proceeds or assets might come from the sale of literature (using trust copyrights) or NA memorabilia (using trust trademarks) to whatever uses would most benefit the NA Fellowship.

Item 5. *How, to whom, and why would property be "encumbered, mortgaged, or pledged"?* This is one of the standard clauses in trust instruments. It is usually intended to indicate that the trustee has been granted full authority to manage the trust property, especially for purposes of interaction with financial institutions. This power is very similar to a homeowner's ability to secure a mortgage on the equity in his or her house. It simply means that the trustee could use trust property as collateral in securing a loan, if that were held to be in the best interests of the trust. Note, however, that the most important of the trust properties—our fellowship's name and logos and the copyrights to NA's literature—*cannot* be put up for a loan.

Item 8. *Borrow money from whom? Why does this not say anything about excluding outside enterprises or being self-supporting?* Item 8 allows the trustee to borrow money in the name of the trust and to use the proceeds from sales of literature (using trust copyrights) or memorabilia (using trust trademarks) to repay the loan without allowing a claim to be made on the trust properties (the copyrights and trademarks) themselves. Most businesses avail themselves of credit-line services offered by financial institutions. It is the belief of the World Board that this service is not an “outside *contribution*” since NAWS, Inc. not only repays the principal but also makes interest payments for its use.

Item 9. This item simply authorizes the trustee to settle any legal actions taken against the trust should the trust itself be sued, and to release others from claims arising from disputes initiated by the trustee if such is deemed to be in the best interests of the trust.

Item 11. *Does this include writers? What does “administrative duties” mean?* This item allows the trustee to hire or contract with people specifically to manage affairs related to the trust arrangement itself. Such administrative duties might require the assistance of attorneys to register copyrights and trademarks, accountants to keep track of the proceeds from the sale of literature and memorabilia, or administrative staff to compile necessary reports on trust activities, process trust-related correspondence, or evaluate requests to reprint literature protected by trust copyrights. Editorial staff could be used to draft or edit reports for these purposes, of course, but this item does not give the trustee specific authority to hire writers to help with the drafting or editing of literary projects being developed by one or another of the WSC boards or committees (now the World Board). The authority to spend money generated from the sale of copyrighted literature or memorabilia using trust trademarks to hire staff to provide “administrative, organizational, and logistical services to the World Service Conference” (writers among them, should they be required) is detailed in Article IV, Section 9, Item 1 of the Operational Rules.

Item 12. This item gives the trustee the authority to sign whatever legal documents it must sign in the course of carrying out its responsibilities.

Item 13. This item gives the trustee the authority to defend itself if it is sued and to file its own lawsuits against others, not only to protect the trust property but also to protect the trustee from liability, so long as its actions have been taken within the framework of its duties. Note that the matter of filing suit to protect the fellowship's literature and logos is dealt with in much greater detail in Article IV, Section 11 of the operational rules.

What is the purpose of Section 5? Would it mean that new groups would not be able to get starter kits from NAWS? Would it mean they couldn't get literature if they couldn't afford it?

Under California trust law, the power to make loans to the beneficiary is one of the standard powers assigned to trustees. Therefore, we must specifically limit this power in our trust's instrument if we do not wish monetary loans to be made from the trust.

This section does not limit the kinds of group service efforts we have come to expect from NAWS. It does not prevent NAWS from providing new groups with starter kits, and it does not restrict NAWS from making appropriate arrangements to distribute literature at reduced cost or free of charge in cases of need. (See Article IV, Section 9 of the Trust Operational Rules, and specifically Item 2.)

In Section 6, define “indemnify.” Is there any insurance policy? A different policy for the World Board? What are some examples of “other persons”? Define “wrongfully consented to”; give possible examples.

To indemnify means “to secure against hurt, loss, or damage.” All this section does is provide that none of the persons mentioned will be burned at the stake for making a simple error in judgment made while carrying out their duties, provided the error is made in good faith. The “other persons” referred to could include either those who are contracted to provide specific services for NAWS, Inc. or who provide services on a voluntary basis at the behest of the corporation. If any of them are sued for something they’ve done in the performance of their duties, Article V, Section 6 of the trust instrument requires the trustor to protect them from personal harm.

Early in 1992, NAWS, Inc. extended its liability insurance coverage to provide this specific kind of protection for members of the World Board (including its officers), other volunteers on world service business, WSO employees, and those under specific contract to NAWS, Inc. A single policy covers them all. Authorization for such insurance has been specified since 1987 in Article 8 of NAWS, Inc. bylaws.

Note that this section does *not* protect board members, officers, employees, or anyone else from any liability that may arise from wanton neglect of their responsibilities or from malicious acts. Nor does this section provide for protection against liability arising from “any act wrongfully consented to by the beneficiary or trustor.”

Why can an individual be sued by the trustee (NAWS, Inc.) while an individual associated with the trustee cannot be sued for their actions? Why does the trustee have more rights and protection than the beneficiary?

It’s true that both the trust instrument and the operational rules have provisions allowing the trustee to file lawsuits to protect both itself and NA’s literature and logos. (See instrument, Article V, Section 4, Item 13, and rules, Article IV, Section 11.) To date, the fellowship has stated in no unclear terms that NAWS, Inc. is responsible to protect the fellowship’s literature and logos from anyone who threatens them, whoever those persons may be. This is simply a restatement of the intent of our First and Fourth Traditions in the context of the entire fellowship’s intellectual property rights: No individual NA member, no individual NA group has the right to take action benefiting themselves that would impair our common welfare or negatively impact NA as a whole in any serious way. If the fellowship were to forbid the trustee to protect NA’s copyrighted literature from being altered or published at will by individual members or groups, the courts would interpret that as the fellowship’s way of saying that they had

abandoned their collective control of the copyrights to NA literature—to put it bluntly, we would lose our copyrights to the Basic Text and all other NA literature.

Let's clarify the matter of lawsuits and the indemnification provided to NAWS members, employees, and contractors. Indemnification simply provides assurance that those who serve on our World Board or who take employment at NAWS will not be subject to personal financial ruin if they are sued for doing their jobs. They are given this kind of protection because it is conceivable that people put in such a position on our behalf may need it and because our fellowship has refused to put them in that position without backing them up. This does not give them more rights than the beneficiary. Remember, the beneficiary is “the Fellowship of Narcotics Anonymous as a whole.” In the normal course of trust activities, NA as a whole is not exposed to any liability at all; only the trustee is exposed to such liability. The only reason the beneficiary, as defined in this trust, is not provided indemnification from liability is because the beneficiary *has* no liability associated with the trust.

Why is Section 7 there?

Organizations taking part in political activities are regulated by the tax authorities in a different way than nonpartisan organizations. Therefore, any public benefit or charitable organization applying for tax exemption must include such a provision in its organizing instrument.

ARTICLE VII: TERMINATION

Under what circumstances could “the trust purpose [be] fulfilled”?

This is a standard provision in the articles of incorporation or bylaws of many nonprofit organizations. The trust purpose may be fulfilled either when addiction disappears or when a cure is found—granted, not a likely occurrence. On the other hand, it could conceivably come to be impossible for the trust purpose to be fulfilled if, for instance, legislation is enacted outlawing the association of known addicts.

ARTICLE VIII: JURISDICTION

Why California and not some other USA state?

Because the standards of accountability that trustees are held to in caring for a trust are far stricter in California than anywhere else in the USA. Registering the Fellowship Intellectual Property Trust in California provides the fellowship with the greatest possible protection. NAWS corporation has had principle offices and has been registered in the State of California since 1977. The California Attorney General's Office would probably have had some serious questions if we had tried to establish this trust in a state with more lenient standards of care.

Why no jury trial?

Because trusts are subject to probate law, not criminal law, and juries are not used in probate court. This is merely a statement of legal fact concerning all trusts under California law, not a special provision of the Fellowship Intellectual Property Trust.

ARTICLE IX: TRUST REGISTRATION

When the trust was approved, the RDs who voted on the groups' behalf to do so selected one of their members to sign the instrument for them before it was filed with the California attorney general as shown on page 5. The same will have to be done in the future if the instrument is ever revised.

TRUST OPERATIONAL RULES

The next section of the trust document is the working “operational rules,” the bylaws or guidelines ~~which~~ that control the actual administration of the trust and the relationship between the parties to the trust: the fellowship, its representatives, and Narcotics Anonymous World Services.

ARTICLE I

Section 1

Section 1 provides a brief documentary history of the trust relationship that had already developed between the fellowship, the World Service Office, the World Service Board of Trustees, and the World Service Conference prior to the formal creation of the Fellowship Intellectual Property Trust.

Section 2

Section 2 summarizes the general purpose of the Trust Operational Rules.

Section 3

Section 3 briefly defines and describes the three parties to the Fellowship Intellectual Property Trust: the *Trustor*, the *Trustee*, and the *Beneficiary*. In all trusts, the *trustor* establishes the general policies that guide the administration of the trust property. The *trustee* carries out the trustor's instructions in the day-to-day management of the property of the trust. And the *beneficiary* is the person or group of people in whose interest the trust is managed. In this trust, the trustor is the Fellowship of NA as given voice by its groups through their RDs at the World Service Conference, the trustee is Narcotics Anonymous World Services, Inc., and the beneficiary is the NA Fellowship as a whole. It is our belief that these trust roles line up pretty closely with the roles the RDs, NAWS, and the fellowship have already come to play in NA's development. With the exception of our narrowed definition of the trustor as the body of RDs, we have not described anything new in the Fellowship Intellectual Property Trust; we have merely tried to mirror the existing service relationships in our fellowship.

The means by which the fellowship acts as trustor is described in a very specific, even peculiar way. What is behind this language?

In developing the trust, we had originally identified the World Service Conference itself as the trustor. Historically, the NA groups have given the conference authority to make decisions concerning services affecting the entire fellowship, putting it in a good position to act as trustor of the Fellowship Intellectual Property Trust. However, identifying the WSC itself as trustor created two problems.

First, because the trustor must be the actual owner of whatever is being placed into trust, we would have to find a way to identify the fellowship itself as the trustor and, hence, the “equitable” (or moral) owner of NA's literature and logos.

Second, with the approval of *Twelve Concepts for NA Service* in 1992, our fellowship had agreed that decisions affecting the NA message must be decided, in some fashion, by the NA groups. For example, the essay on Concept Two reads, “proposals to change NA’s Twelve Steps, Twelve Traditions, name, nature, or purpose should be approved directly by the groups.” The NA name, being a registered trademark and service mark, is one of the intellectual properties covered by this trust; the nature and purpose of Narcotics Anonymous are defined by its copyrighted literature, also protected under the Trust. Giving the whole WSC body authority to make decisions about the Fellowship Intellectual Property Trust seemed to run contrary to the spirit of the Twelve Concepts. Somehow, the Trust would have to identify either the NA groups or their direct representatives as the collective trustor.

However, we could not show the duties of the trustor of the Fellowship Intellectual Property Trust as being dissipated among the individual groups because the decisions the trustor has to make affect the fellowship as a whole. To give individual groups the ability to take action on their own that could seriously affect other groups or NA as a whole would contradict our Fourth Tradition. Somehow, we had to provide means by which the groups or their direct representatives could fulfill their responsibilities as trustor in a coordinated way, so that they all took part in decisions affecting them all.

That’s how we came to define the trustor as:

1. the Fellowship of Narcotics Anonymous
2. as given voice by its groups
3. through their regional delegates
4. at the World Service Conference.

The fellowship itself, as given voice by its groups through their regional delegates at the World Service Conference, is identified as the Trustor and, therefore, the equitable owner of NA’s literature and logos. The NA groups are placed in direct control of the trust because the trust directly affects the interests of each individual NA group. Only their direct representatives, the RDs, are recognized as having the ability to make decisions on their behalf concerning the Trust. The RDs are required to make those decisions only within the context of the WSC, assuring that action affecting the entire fellowship will be conducted in a coordinated fashion.

ARTICLE II

The first four sections of this article simply describe the items that have been placed in trust: NA’s Twelve Steps and Traditions, other NA literature, NA’s name and marks, and the copyrights to NA literature. The Trust document regulates the creation, revision, and use of these items in a way consistent with already-approved policy.

Ownership

Throughout Article II, we find statements like this: “The ownership of [our literature] will be registered in the name of the Trustee,” Narcotics Anonymous World Services, Inc.

Some members might ask, “Does this mean that the fellowship doesn’t own its own literature?” The answer to that question is *no*.

Ever since the World Service Office (now called Narcotics Anonymous World Services, Inc.) was created in the early 1970s, it has been the registered *legal* owner of the copyrights to our literature. However, the *equitable* owner of our literature is the fellowship itself, as described in Article I, Section 3 of these rules. Narcotics Anonymous World Services, Inc. is not, after all, a completely independent entity; it is our fellowship’s world service corporation. All Article II says is that legal ownership of the fellowship’s literature will be registered in the name of the fellowship’s legal corporation.

Regarding Section 3, does this include coffee cups, the Basic Journal, and other memorabilia products?

Trademarks and service marks, described in Section 3, are included among the trust properties. Use of these marks on coffee cups, the Basic Journal, or other memorabilia are subject to regulation by the Trustee.

Regarding Section 3, define “hybrid”

Hybrids of the NA logos are fairly common—for instance, the stylized NA initials with the “NA Tree” superimposed.

Does Section 4 affect H&I’s “*Reaching Out*” newsletter?

Reaching Out, specifically, is not currently copyrighted because the conference has not given any instructions to restrict its duplication.

Section 5: works made for hire

Section 5 offers a very specific definition of the terms under which NA literature is created and copyrighted. We believe this definition is consistent with precedence, already-established fellowship policy, and our fellowship’s philosophy of both the anonymity and the accountability of its trusted servants. When our trusted servants take part in an NA service project, we expect them to do so not to accrue power, property, or prestige to themselves but to unselfishly serve our fellowship. And we expect that our fellowship, through its representatives in the service structure, will have final authority over such projects from start to finish.

Does this mean that no literature will be originated outside the World Board? Is an individual, group, area, or region prohibited from writing literature?

No, to both questions. First, note that this section refers to *all* the world service boards and committees, ~~not just the conference literature committee~~. Material originated in an individual’s home, for instance, or in a group, area, or region would only need to be accompanied by a copyright release before it could be incorporated into the NA literature development process, as has always been the case.

Does this mean that no individual who may have a vast knowledge in a particular area of recovery and/or the fellowship may have his or her name printed?

Though we do not print NA books or pamphlets showing the names of individual authors, that is not what this section refers to. This says that individuals who take any part, big or little, in helping create literature for NA must do so for the fellowship's benefit, not their own. The copyrights will be registered in the trustee's name, protecting the entire fellowship's rights to the literature, *not* in the names of any individuals who may have had a part in the project. Creative members who wish to write and publish their own copyrighted recovery material under their own names are not prohibited from doing so, provided they do not use the NA name or other trademarks.

If the trustor has constant control over literature from commencement to conclusion, does that include area or regional newsletters?

No. This refers only to *trust* literary properties—materials created in the name of NA as a whole. For more information on local newsletters, see the approved *Handbook for NA Newsletters*, available from the World Service Office.

ARTICLE III

In this article, the role of the fellowship in the creation, approval, and revision of NA literature is clearly described: The fellowship, as given voice by its groups through their RDs at the WSC, currently has sole authority to approve or revise NA literature. Primary among the “agents” referred to in Section 1 is the World Service Conference and the boards and committees through which it does its detail work.

Does the way Section 1 is written exclude the creation of literature, etc., outside of the WSC/NAWS—for instance, in groups or areas?

No. This says only that the conference has sole authority with regard to literature created “for and on behalf of the NA Fellowship,” referring to the *entire* fellowship.

Does this leave anything out (keytags, world convention cups, etc.)?

No. What's being regulated is not the products (keytags, cups) themselves, but the NA trademarks and service marks used in *making* those products—all those products, no matter who their manufacturer may be.

Why is Section 2 included in the rules?

To clarify the relationship of the World Service Conference, our fellowship's general decision-making body, with its boards and committees, to the trustor. While the trustor—the RDs at the World Service Conference—has direct authority in matters relating to the intellectual property trust, the trustor has a standing relationship with the World Board which facilitates the actual work involved in developing new material and revising existing materials within the terms of the trust.

It sounds like the Basic Text and other pieces of NA recovery literature may be revised with only one hundred fifty days notice. Is this true?

Yes, technically speaking. This reflects conference action. However, the same action showed an understanding that the fellowship should be given as much time as possible to review new or revised literature being proposed for its approval.

ARTICLE IV

This article of the operational rules goes into great detail in describing the role, responsibilities, and limitations that have been placed on Narcotics Anonymous World Services, Inc. in administering the fellowship's literature and logos.

Section 3: What is fiduciary relationship?

Section 3 defines the "fiduciary" relationship between the trustor (the body of fellowship delegates) and the trustee (NAWS). Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property, and may take it back if he or she pleases. This is the fiduciary relationship, and it matches well the arrangements that have been made in past years for the management and protection of NA-approved literature copyrights and logos by Narcotics Anonymous World Services, Inc.

Does Section 4 conflict with the Trust Instrument, Article V, Section 4, Item 11?

No, this section does not conflict with the trustee's authority to hire people, granted in the instrument; it says specifically "that this provision shall *not* prevent payment to any such person of reasonable compensation for services rendered to or for the trustee in furtherance of its purposes."

What are some examples of expenses?

Members of the World Board of NAWS are routinely compensated for their expenses associated with travel to and from board meetings—airfare, meals, and lodging. Another common expense is for phone calls used to conduct NAWS board business.

Does this mean non-addict authors for hire? Are more specific guidelines needed?

While there is nothing in this section forbidding the hiring of non-addict authors by NAWS, WSC guidelines prohibit their use in the development of NA literature (Sec. 3-G). That seems to be sufficiently specific for our purposes.

Regarding Section 7, does Item 1 mean logos can be changed at any time?

If what you mean by “logos” is the Narcotics Anonymous name, the design of the stylized NA initials, the diamond in a circle, or the original NA group logo, the answer is *no*. Changes in those trademarks and service marks can only be made by the fellowship itself as given voice by its groups through their RDs at the conference.

Does Item 2 mean the trustee totally controls pricing of all literature?

Yes—that is, Narcotics Anonymous World Services, Inc. controls the prices at which NAWS sells materials to others. This has been standard policy since the office's creation.

Section 11: How does the trustee protect the trust property?

This section describes the process to be used in protecting the trust's intellectual properties. It allows Narcotics Anonymous World Services, Inc. to respond in a timely manner to infringement of the trust's copyright, trademark, and service mark registrations, and to inform the fellowship of the problem. It also gives the office the authority to settle the problem in the best interests of the fellowship, provided that the members of the World Board concur. The provisions of Section 11 are consistent with a motion regarding infringement action approved at WSC'91.

Regarding Section 11, Item 5, does this mean that NAWS, Inc. can file a lawsuit without telling (or asking) the WSC if it thinks that it may jeopardize the success of that action?

Yes. As we were putting the trust documents together, the only situation in which we imagined this occurring would be if one or more conference participants themselves were targets of a particular suit. Note also that the item says that prior notice cannot be withheld unless it “would *demonstrably* impair the trustee's ability to effectively protect the trust property.” Should the RDs, as trustor, ever suspect that notice had been withheld without due cause, they could—and should—require NAWS to demonstrate its case.

Section 12: What is the trustee reporting obligation?

This section lays out the fellowship's requirements for full annual reports from Narcotics Anonymous World Services on its finances and operations, especially as they relate to the fellowship's literature. This section is included to ensure that NAWS, as trustee, remains fully accountable for the way in which it administers our intellectual property trust.

ARTICLE V

This article describes the role of the beneficiary, the NA Fellowship as a whole, in the trust. One section deserves particular attention: Section 3.

Section 3

This section describes how a single region can make a request if it has concerns about the financial activities associated with the Fellowship Intellectual Property Trust. It describes some of the ways that financial assurance is provided through reporting and independent audits. It then describes a process to use if the region still has concerns after reviewing the information available. The first step is to contact the World Board. If the concern is still unresolved, the final step is to ask the fellowship to support an inspection through a motion in the Conference Agenda Report. Only the WSC can make the decision to initiate an inspection request, as they speak for the beneficiary and are responsible for the allocation of NA World Service's resources. goes far beyond the legal requirements normally imposed on trusts. Normally, the beneficiary of a trust is not permitted to examine the trustee's records under any circumstances. Such an arrangement, however, would not be appropriate in Narcotics Anonymous, especially in light of our Ninth Tradition and Second Concept. Therefore, we have drafted Section 3 in such a way as to allow segments of the fellowship to review the records of Narcotics Anonymous World Services, Inc. Any region may inspect any NAWS records except its personnel records. (USA federal employment codes require that employers keep these records completely confidential.) The inspection team would be led by a member of the World Board who is intended to serve as mediator and controller of the inspection. The reporting coming out of the inspection is designed to be objective, and its results are to be distributed to all RDs. This inspection procedure can do two things:

1. It can defuse controversy by thoroughly and objectively investigating any suspicion of impropriety on the part of NAWS in its administration of the trust.
2. It allows for open communication, thereby removing any air of suspicion or doubt.

Does there need to be a specific “concern” to justify an inspection?

Item 3 under “Conditions of Inspection” requires the RSC that requests the inspection to “detail its concerns and any particular areas of trust operations it wishes to inspect.” Given the resources that are already used to provide assurance of the financial activities and reporting for NA World Services, any concern should be articulated in a way that clearly outlines the issue and what the region believes should be inspected. This provision facilitates easy inspection of particular aspects of trust operations, should only limited areas be of concern.

ARTICLE VI

This article provides for a two-stage approach to the revocation and reassignment of trustee rights and responsibilities. The plan is based on the fact that revocation of the trustee's responsibilities would be a major organizational move. Such a move should

take place only if there is widespread, serious concern about the trustee's ability to fulfill its responsibilities, and only after thorough review.

Section 1

The first stage of the revocation process describes the means by which it will be determined whether there is substantial concern about the trust's administration. If so, the RDs must then approve *consideration* of a revocation proposal by a majority.

Sections 2, 3

The second stage of the revocation process describes the *actual* consideration, revocation, and reassignment. This stage takes a conference cycle to complete, allowing time for discussion and fellowship input. The committee created to study the revocation proposal is composed of a cross-section of World Service Conference participants, with a member of the World Board chairing the committee. The decision to revoke the trustee's rights and responsibilities requires approval of two-thirds of the RDs, ensuring substantial consensus on so weighty a decision.

ARTICLE VII

This article is a simple process for revision of the Trust Operational Rules and, more significantly, of the Trust Instrument itself. Revision of the Operational Rules can be accomplished on the spot. Revision of the Trust Instrument, however, takes longer. This is to assure that adequate consideration is given such a change.

What happens to the trust when and if the service structure changes?

Article VII of the Trust Operational Rules describes clear procedures by which both the instrument and the rules can be revised to conform with any change in the service structure.

GLOSSARY

A

Arbitration. Specific means by which civil disputes may be settled out of court; in California, regulated by civil code. (Instrument, Article V, Section 4, Item 9)

B

Bond. A deposit guaranteeing performance of an act previously agreed to, which is forfeited if the act is not fulfilled according to terms. (Instrument, Article I, Section 5)

C

Conveyance. The transference of property (esp. real property) from one person to another by any lawful act; in modern use only by deed or writing between living persons. (Instrument, Article I, Section 2)

Copyrights. The exclusive right given by law... to an author, composer, designer, etc. (or his assignee) to print, publish, and sell copies of his original work.

E

Encumber. To burden (a person or an estate) with debts; *esp.* to charge (an estate) with a mortgage. (Instrument, Article V, Section 4, Item 5; and Article V, Section 5)

F

Fiduciary. A *fiduciary relationship* is “one founded on trust or confidence reposed by one person in the integrity and fidelity of another.” Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property and may take it back. (Instrument, Article V, Section 4; Operational Rules, Article I, Section 1; and Article IV, Sections 2, 3, and 10)

H

Hybrid trademarks, service marks. The combination of one registered trademark or service mark with one or more other marks, whether registered or not. (Operational Rules, Article II, Section 3; Article IV, Section 5)

I

Indemnification. To secure against hurt, loss, or damage (esp. by means of an insurance policy). (Instrument, Article V, Section 6)

Infringement. A breaking or breach (of a law, obligation, right, copyright, patent, etc.); breach, violation. (Operational Rules, Article I, Section 1; Article IV, Section 11)

Injunction. A judicial process by which one who is threatening to invade or has invaded the legal or equitable rights of another is restrained from commencing or continuing such wrongful act, or is commanded to restore matters to the position in which they stood previously to his action. (Operational Rules, Article IV, Section 11, Item 5)

Intellectual property. Creations of the mind or spirit. Types of intellectual property include literature, trademarks, patents, and manufacturing processes, among others.

L

Legal form of business. The organizational type under which a business is registered with the government. Such forms include corporations, foundations, partnerships, and unincorporated associations of individuals. (Instrument, Article V, Section 4, Item 3)

P

Pecuniary profit. An award resulting from a lawsuit. (Operational Rules, Article IV, Section 3)

Performance audit. A meticulous examination of management policies and procedures. (Operational Rules, Article IV, Sections 10 and 12)

Detail: A normal *audit* occurs when a CPA comes into the office, reviews the accounts, prepares the annual financial statements, and certifies the integrity of the books with specific notes. This kind of audit is currently conducted each year at NAWS, and its results are published in NA World Services Annual Report.

A *performance audit* is more complicated, more time-consuming, and vastly more expensive. The accountants come in, review NAWS financial policies, then track through every aspect of everything NAWS does that has to do with either incurring expense, paying out money, or receiving payment. Once they've completed their job, they issue a comprehensive report and set of recommendations on NAWS financial procedures along with the ordinary statements and certification. No performance audit has yet been conducted of NAWS.

Perpetual charitable trust. *Perpetual* means “never ceasing; continuous; enduring; lasting; unlimited in respect of time.” A *charitable trust* is defined as a “fiduciary relationship with respect to property arising as a result of a manifestation of an intention to create it, and subjecting the person by whom the property is held to equitable duties to deal with the property for a charitable purpose.” A *charitable purpose* is thought of as the “accomplishment of objectives which are beneficial to the community or area.” And a *fiduciary relationship* is “one founded on trust or confidence reposed by one person in the integrity and fidelity of another.” (Instrument, Article I, Section 3)

Probate Code, California. The branch of California civil code governing trusts. (Instrument, Article VIII)

Prudence. Ability to discern the most suitable, politic, or profitable course of action, esp. as regards conduct; practical wisdom, discretion. Wisdom; knowledge of or skill in a matter. Foresight; providence. *Note that in the course of California Probate Court action, “prudence” as affecting the administration of trusts has come to describe certain specific standards of care.* (Instrument, Article V, Sections 3 and 4)

R

Ratify. To confirm or make valid (an act, compact, promise, etc.) by giving consent, approval, or formal sanction (esp. to what has been done or arranged for by another). (Operational Rules, Article I, Section 1; Article IV, Section 11, Item 4)

Recovery literature. Any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Register. To make formal entry of (a document, fact, name, etc.) in a particular register; also to get (a document, etc.) entered in the register by the person entitled to do so. (Instrument, Article IX; Operational Rules, Article I, Section 3; Article II, Section 5; Article IV, Section 5)

S

Seizure orders. Court orders to seize a person's property to remedy prior damage to another or to prevent the possibility of further damage. (Operational Rules, Article IV, Section 11, Item 5)

Service marks. A mark or device used to identify a service offered (such as transportation or insurance).

Service materials. Handbooks or other materials intended primarily for use within the context of an NA service board or committee. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Settlor. The dictionary defines *settlor* as “a person who makes a settlement of property.” When the trust instrument says that “the Fellowship of Narcotics Anonymous... is the Settlor and Trustor,” it means that the fellowship is the creator of both the property being placed in trust and the trust itself, and therefore maintains equitable ownership of the trust property. (Instrument, Article II)

T

Third-party liability. A liability in the nature of a contingent claim, wherein the trustee is not accused of having caused damages and does not claim to have been harmed but is rather held liable for someone else's damages. (Instrument, Article V, Section 4, Item 7)

Trademark. A mark secured by legal registration used by a manufacturer or trader to distinguish his goods from similar wares of other firms; usually a distinctive device or figure, a fancy name or trade name, or the name of an individual or firm, marked or impressed on the article or upon the package, etc., in or with which it is sold.

Addendum C

Intellectual Property Bulletin #1 Clean Copy of Proposed Revision

Internal Use of NA Intellectual Property

The NA Fellowship's policy on the reproduction and use of copyrighted NA Fellowship-approved recovery literature and the use of registered NA trademarks by NA groups, service boards, and committees.

The Fellowship Intellectual Property Trust (FIPT) describes in detail how NA's name, trademarks, and recovery literature are protected and administered by Narcotics Anonymous World Services, Inc. (NA World Services). At the request of the Fellowship, as given voice by its groups through their regional delegates at the 1993 World Service Conference, and for the benefit of the Fellowship as a whole (who is the Beneficiary of this Trust), the FIPT was created, and NA World Services was formally appointed the Trustee of the Fellowship's intellectual properties, and confirmed to be the sole publisher and distributor of all NA recovery literature. NA World Services is directly accountable to the World Service Conference and, as trustee, holds legal title to all NA trademarks and recovery literature. This bulletin and other Intellectual Property Bulletins are presented as an adjunct to the FIPT and contain the policies related to the accepted use of NA's intellectual properties within the Fellowship, without having to request specific permission from NA World Services. These policies are based partly on legal considerations and partly on the nature of NA. By creating these policies, the Fellowship helps ensure that NA's name, trademarks, and recovery literature will always be available to fulfill our primary purpose.

Our Fiduciary Duty

As trustee, NA World Services has been entrusted with the responsibility to obtain, maintain, and enforce copyright and trademark protection for NA's name, trademarks, and recovery literature on behalf of the Fellowship. Because no one person or group of people owns Fellowship-approved literature, copyright ownership is registered in the name of Narcotics Anonymous World Services, Inc. This ensures, among other things, that the Fellowship's message as presented in our recovery books and pamphlets is not tampered with, used, or sold by others, and the Fellowship's trademarks are not used in an improper way. This is first and foremost about the integrity of the NA message and the need to protect NA's intellectual property so that NA can continue to own and control its own material. NA World Services has also been delegated the responsibility to ensure that Narcotics Anonymous literature being distributed contains the current text agreed upon by the Fellowship of Narcotics Anonymous. Protecting our copyrights and trademarks is an essential way to guarantee the conceptual fidelity of the NA message in NA literature, and to safeguard the property of the NA Fellowship.

In order to maintain copyright control, NA recovery material can only be reproduced with permission of NA World Services, the copyright holder. All recovery material has a Fellowship-approved logo, described later in this document. This bulletin attempts to outline that permission within Narcotics Anonymous. You can find additional information about these efforts at www.na.org/fipt.

Making our Message Available

NA World Services goes to great lengths to ensure access to the NA message. Fellowship-approved recovery pamphlets, meeting readings, and booklets are posted on www.na.org in over 55 languages. Fellowship websites that wish to provide access to this material should include a link to these pieces, rather than copying or posting this material themselves. NA World Services does not currently post book-length pieces of NA literature online because of our previous experience with the widespread proliferation of PDF versions. Our practical inability to control widespread distribution of electronically produced materials weakens the Fellowship's ability to protect its copyrighted material. We fulfill this need by distributing thousands of printed books and other recovery literature to addicts in need each year.

Most of NA World Services' income comes from proceeds on the sales of printed literature, and it currently gives away or subsidizes more than a half million dollars' worth of literature each year. The money members do or don't spend on literature affects NA World Services' ability to respond to requests for literature from addicts across the globe. We are not a normal business; we are a spiritual Fellowship that has to manage a business, and that is NA World Services. However, in order to fulfill our mission—to work toward a future where “every addict in the world has a chance to experience the message in his or her own language and culture”—NA World Services needs to remain financially stable and able to reproduce, register, and protect the intellectual property of Narcotics Anonymous.

Policy for Use and Reproduction of NA Recovery Literature by Groups and Service Bodies

Use by individual NA members or others

Policies, in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to use NA trademarks or to reproduce its copyrighted recovery literature, or other intellectual property. Individual NA members or others who wish to use NA's trademarks or copyrighted recovery literature should write directly to Narcotics Anonymous World Services, Inc.

Use by NA groups

As a general rule, no one has the authority to reproduce NA Fellowship-approved recovery literature without prior written permission from NA World Services. However, given the nature of our Fellowship, our experience indicates that NA groups *and only NA groups* should have the authority to reproduce current Fellowship-approved recovery literature pamphlets and booklets, so long as they consider the Fourth Tradition and the limitations described here. A description of the NA group—its nature, function, and role in the NA Fellowship—can be found in the *Group Booklet*. This permission does not apply to any Fellowship-approved book-length pieces.

When considering the need to reproduce NA Fellowship-approved recovery literature, NA groups should consider the spiritual principles of responsibility, unity, and autonomy as referenced in our Fourth Tradition, and follow all of these general policies:

1. An NA group can only reproduce current booklets and pamphlets of NA Fellowship-approved recovery literature when it has a clear need to do so.
2. NA Fellowship-approved recovery literature reproduced by an NA group can only be distributed within that group and never distributed online or in an electronic format. Such materials should always be given away free of charge; they cannot be sold to generate income.
3. The text of NA Fellowship-approved booklets and pamphlets reproduced by an NA group cannot be altered or modified in any way.
4. The copyright for the item being reproduced should be shown prominently as follows: “Copyright © [year of first publication], Narcotics Anonymous World Services, Inc. Reprinted by permission. All rights reserved.”

Use by registered NA service bodies

NA service bodies that are registered with Narcotics Anonymous World Services, Inc., may quote or reproduce portions of NA Fellowship-approved recovery literature, up to 25 percent of the original piece. In the case of NA book-length literature, registered NA service bodies may reproduce or quote up to 25 percent of a single chapter; daily meditation entries are considered a chapter. If you have questions or want approval to exceed these limits, please contact Narcotics Anonymous World Services, Inc.

For locally developed resources, we ask that the piece clearly state what it is and what service body approved it. In order to avoid confusion, the formatting should not resemble NA recovery literature. Translations of NA recovery literature often involve local reproduction during the local approval process. Approvals for this purpose can be obtained by contacting Narcotics Anonymous World Services, Inc. Any use of NA's name, trademarks, recovery literature, or other intellectual property that is not specifically covered here is reserved to Narcotics Anonymous World Services, Inc.

NA service bodies that are registered with Narcotics Anonymous World Services, Inc., that wish to quote or reproduce portions of NA Fellowship-approved recovery literature should always include the proper notation or credit identifying the origin of the quote or portion.

POLICY FOR USE OF NA TRADEMARKS BY GROUPS AND SERVICE BODIES

Use by individual NA members or others

Policies in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to reproduce or use NA trademarks or other intellectual property. Individual NA members or others who wish to use NA's trademarks or copyrighted recovery literature should write directly to Narcotics Anonymous World Services, Inc.

Use by NA groups and service bodies

The policies below outline how NA groups and service bodies (registered with Narcotics Anonymous World Services, Inc.) may use NA's trademarks.

Some of the NA Fellowship's registered trademarks are the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, the original NA group logo, and the PR "stamp" logo, all shown below:



Policies for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. The Narcotics Anonymous name or trademarks should not be used by an NA group or service body in any way that would imply affiliation, legal liability, or financial responsibility by or to another part of the Fellowship, service structure, or outside enterprise. That means that we should not use the Fellowship's trademarks, name, or logos:

- in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise;
- in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials;
- in a manner so as to possibly offend or disrespect the sensibilities of other organizations, groups, or NA as a whole; or
- in any manner that could draw us into public controversy.

"NA Fellowship Approved" Trademark

The "NA Fellowship Approved" trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference. Literature with this trademark is typically the only type of literature read in NA meetings. The "NA Fellowship Approved" trademark is only used by Narcotics Anonymous World Services, Inc., and may not be used by any NA group, service body, or any others, on any other materials.



Marking Trademarks

The symbol ® should be placed to the right of all registered NA trademarks every time any of them are reproduced or used, whenever possible. By doing so, we are showing that these trademarks are legally owned or registered. This is one way in which we help preserve the Fellowship's legal right to ownership of its trademarks.

Protecting Artwork

Whenever an NA group or service body has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the Fellowship can later be used to benefit a private individual or an outside business enterprise.

NA Intellectual Property Bulletin #1 was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference on 27 April 1993, applicable as of 1 May 1993. It was amended at the World Service Conference in 1997 and 1998. This bulletin supersedes all previous bulletins and policies pertaining to the use of copyrighted literature and registered trademarks by NA groups, service boards, and committees.

This is the document identified by name in the Fellowship Intellectual Property Trust Operating Rules, Article V, Section 1. It was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference as Trustor of the Fellowship Intellectual Property Trust on 27 April 1993, and revised by the regional delegates at the World Service Conference on 30 April 1997 and 27 April 1998. It may be changed only by the Trustor.

**To register, or for more information, contact NA World Services,
PO Box 9999, Van Nuys, CA 91409 USA, Tel: (818) 773-9999, Website: www.na.org.**

Addendum D

Intellectual Property Bulletin #1 Proposed Revision with Changes Tracked

Internal Use of NA Intellectual Property

A statement of the ~~The~~ NA Fellowship's policy on the ~~reprinting~~ **reproduction and use** of copyrighted NA Fellowship-approved recovery literature and the use of registered NA trademarks ~~and service marks~~ by NA groups, service boards, and committees.

—The Fellowship Intellectual Property Trust (FIPT) describes in detail how NA's name, trademarks, and recovery literature are protected and administered by Narcotics Anonymous World Services, Inc. (NAWS). ~~It covers NA's name, NA World Services). At the request of the Fellowship, as given voice by its groups through their regional delegates at the 1993 World Service Conference, and for the benefit of the Fellowship as a whole (who is the Beneficiary of this Trust), the FIPT was created, and NA World Services was formally appointed the Trustee of the Fellowship's intellectual properties, and confirmed to be the sole publisher and distributor of all NA recovery literature. NA World Services is directly accountable to the World Service Conference and, as trustee, holds legal title to all NA trademarks and recovery literature in all forms, including translations, and all mediums, whether printed, electronic and any other media that may be developed in the future. Additional guidelines, contained in this and the . This bulletin and other Intellectual Property Bulletins, for the use of NA's intellectual properties by the fellowship are presented as an adjunct to the FIPT. The guidelines and contain the policies related to the accepted use of NA's intellectual properties within the Fellowship, without having to request specific permission from NA World Services. These policies are based partly on legal considerations and partly on the nature of NA. By following creating these simple steps policies, the fellowship will help Fellowship helps ensure that NA's name, trademarks, and recovery literature will always be available to fulfill our primary purpose.~~

—All matters not specifically addressed by the Intellectual Property Bulletins will be considered under the conditions of the Fellowship Intellectual Property Trust. Any questions or concerns about the Bulletins should be directed to NA's World Service Office.

—This Bulletin reflects the policy affecting the use of NA intellectual property within the NA Fellowship. Use of the fellowships trademarks and recovery literature is a commitment to comply with these Guidelines. Usage inconsistent with the Guidelines is improper. Usage disputes are dealt with in Intellectual Property Bulletin #5.

Use by NA groups

These Guidelines outline the appropriate uses of NA logos and recovery literature by NA groups. The Guidelines also lay out criteria a group can use to avoid improper use. A description of the NA group—its nature, function, and role in the NA Fellowship—can be found in current NA service manuals. You are encouraged to review those sections describing groups prior to attempting use of the Guidelines described below.

Use by NA service boards and committees

Service boards and committees created directly or indirectly by NA groups may use NA logos and recovery literature in the ways described in these Guidelines so long as they register with NA World Services.

Our fiduciary duty

As trustee, NA World Service has been entrusted with the responsibility to obtain, maintain, and enforce copyright and trademark protection for NA's name, trademarks, and recovery literature on behalf of the Fellowship. Because no one person or group of people owns Fellowship-approved literature, copyright ownership is registered in the name of Narcotics Anonymous World Services, Inc. This ensures, among other things, that the Fellowship's message as presented in our recovery books and pamphlets is not tampered with, used, or sold by others, and the Fellowship's trademarks are not used in an improper way. This is first and foremost about the integrity of the NA message and the need to protect NA's intellectual property so that NA can continue to own and control its own material. NA World Services has also been delegated the responsibility to ensure that Narcotics Anonymous literature being distributed contains the current text agreed upon by the

[Fellowship of Narcotics Anonymous](#). Protecting our copyrights and trademarks is an essential way to guarantee the conceptual fidelity of the NA message NA literature, and to safeguard the property of the NA Fellowship.

[In order to maintain copyright control, NA recovery material can only be reproduced with permission of NA World Services, the copyright holder. All recovery material has a Fellowship-approved logo described later in this document. This bulletin attempts to outline that permission within Narcotics Anonymous. You can find additional information about these efforts at \[www.na.org/fipt\]\(http://www.na.org/fipt\).](#)

Making our Message Available

[NA World Services goes to great lengths to ensure access to the NA message. Fellowship-approved recovery pamphlets, meeting readings, and booklets are posted on \[www.na.org\]\(http://www.na.org\) in over fifty languages. Fellowship websites that wish to provide access to this material should include a link to these pieces, rather than copying or posting this material themselves. NA World Services does not currently post book-length pieces of NA literature online because of our previous experience with the widespread proliferation of PDF versions. Our practical inability to control widespread distribution of electronically produced materials weakens the Fellowship's ability to protect its copyrighted material. We fulfill this need by distributing thousands of printed books and other recovery literature to addicts in need each year.](#)

[Most of NA World Services' income comes from proceeds on the sales of printed literature, and it currently gives away or subsidizes more than a half million dollars' worth of literature each year. The money members do or don't spend on literature affects NA World Services' ability to respond to requests for literature from addicts across the globe. We are not a normal business; we are a spiritual Fellowship that has to manage a business, and that is NA World Services. However, in order to fulfill our mission—to work toward a future where “every addict in the world has a chance to experience the message in his or her own language and culture”—NA World Services needs to remain financially stable and able to reproduce, register, and protect the intellectual property of Narcotics Anonymous.](#)

Policy for Use & Reproduction of NA Recovery Literature by Groups and Service Bodies

Use by individual NA members or others

[GuidelinesPolicies](#), in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to use NA trademarks, [reproduce its copyrighted recovery literature](#), or [other](#) intellectual property. Individual NA members or others who wish to use NA's trademarks or copyrighted recovery literature should write directly to [NANarcotics Anonymous World Services, Inc.](#)

GUIDELINES FOR USE OF NA TRADEMARKS

[Some of the NA Fellowship's registered trademarks are: the name “Narcotics Anonymous,” the stylized NA initials, the diamond in a circle, and the original NA group logo, all shown below:](#)



Guidelines for Use

~~Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. The Narcotics Anonymous name or trademarks should not be used by an NA group, service board or committee in any way that would imply legal liability or financial responsibility by or to another part of the fellowship, service structure, or outside enterprise.~~

~~—Narcotics Anonymous trademarks should not be used in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise.~~

~~—Narcotics Anonymous trademarks should not be used in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials.~~

~~—Narcotics Anonymous trademarks should not be used or displayed in such a manner as to possibly offend or disrespect the sensibilities of other organizations, groups or NA as a whole.~~

~~—Narcotics Anonymous trademarks should not be used in any manner that could draw us into public controversy.~~

~~—Narcotics Anonymous trademarks should not be used on locally developed recovery literature.~~

~~“NA Fellowship Approved” trademark~~

~~The “NA Fellowship Approved” trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference. The “NA Fellowship Approved” trademark may not be used on any other materials.~~



Marking trademarks

Either the capital letter “R” or a “TM” should be placed inside a small circle to the right of all NA trademarks every time any of them are used. By doing so, we are showing that these logos are legally owned or registered trademarks. This is one way in which we help preserve the fellowship’s legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group, service board, or committee has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the fellowship can later be used to benefit a private individual or an outside business enterprise.

GUIDELINES FOR REPRODUCTION OF NA RECOVERY LITERATURE

NA World Services acts as the publisher of all NA Fellowship-approved recovery literature. As such, it has been entrusted with the responsibility to obtain copyright protection for these items on behalf of the fellowship. This ensures that the fellowship’s message as presented in our books and pamphlets is not tampered with.

—Narcotics Anonymous World Services is largely dependent on the income generated from the sale of NA recovery literature. This income is used to cover the costs of publishing as well as the expenses associated with other services provided to the World Service Conference and the NA Fellowship-at-large. A large part of NA World Service’s income comes from NA groups who purchase recovery literature to distribute at their meetings. Many groups consider their purchase of NA Fellowship-approved recovery literature as one way in which they contribute to the unity and growth of NA as a whole.

Use by NA groups

As a general rule, no one has the authority to reproduce NA Fellowship-approved recovery literature without prior written permission from ~~Narcotics Anonymous~~ [NA World Services](#). However, given the nature of our ~~fellowship~~ [Fellowship](#), our experience indicates that NA groups *and only NA groups* should have the authority to reproduce ~~fellowship-approved recovery literature in certain instances. When preparing to reproduce NA current~~ Fellowship-approved recovery literature, ~~NA groups should discuss pamphlets and booklets, so long as they consider~~ the Fourth Tradition and ~~follow all the limitations described here. A description of these general guidelines: the NA group—its nature, function, and role in the NA Fellowship—can be found in the Group Booklet. This permission does not apply to any Fellowship-approved book-length pieces.~~

[When considering the need to reproduce NA Fellowship-approved recovery literature, NA groups should consider the spiritual principles of responsibility, unity, and autonomy as referenced in our Fourth Tradition, and follow all of these general policies:](#)

1. An NA group ~~should~~[can](#) only reproduce [current booklets and pamphlets of](#) NA Fellowship-approved recovery literature when it has a clear need to do so.
2. NA Fellowship-approved recovery literature reproduced by an NA group ~~should~~[can only](#) be distributed ~~only~~ within that group. ~~and never distributed online or in an electronic format~~. Such materials should always be given away free of charge; they ~~should never~~[cannot](#) be sold to generate income.
3. The text of NA Fellowship-approved ~~books~~[booklets](#) and pamphlets reproduced by an NA group ~~should~~[not](#)~~cannot~~ be altered or modified in any way.
4. The copyright for the item being reproduced should be shown prominently as follows: "Copyright © [year of first publication], Narcotics Anonymous World Services, Inc. Reprinted by permission. All rights reserved."

Use by registered NA service boards and committees

~~Registered NA service boards and committees who wish to quote or reprint portions of NA Fellowship-~~[NA service bodies that are registered with Narcotics Anonymous World Services, Inc. may quote or reproduce portions of NA Fellowship-approved recovery literature, up to 25% of the original piece. In the case of NA book-length literature, registered NA service bodies may reproduce or quote up to 25% of a single chapter; daily meditation entries are considered a chapter. If you have questions or want approval to exceed these limits, please contact Narcotics Anonymous World Services, Inc.](#)

[For locally developed resources, we ask that the piece clearly state what it is and what service body approved it. In order to avoid confusion, the formatting should not resemble NA recovery literature. Translations of NA recovery literature often involve local reproduction during the local approval process. Approvals for this purpose can be obtained by contacting Narcotics Anonymous World Services, Inc. Any use of NA's name, trademarks, recovery literature, or other intellectual property that is not specifically covered here is reserved to Narcotics Anonymous World Services, Inc.](#)

[NA service bodies that are registered with Narcotics Anonymous World Services, Inc. that wish to quote or reproduce portions of NA Fellowship-approved recovery literature should always include the proper notation or credit identifying the origin of the quote or reprinted portion they wish to use. Generally speaking, the length of a reprint or quote should not exceed 25% of the original piece. In the case of NA books, reprints or quotes should not exceed 25% of a single chapter or section. In the case of an article from *The NA Way Magazine*, the entire piece may be used if the source is fully cited.](#)

~~ANY USE POLICY FOR USE OF NA'S NAME, TRADEMARKS OR RECOVERY LITERATURE THAT IS NOT SPECIFICALLY COVERED IS RESERVED TO NAWWS, INC. THE USE COVERED~~
[NA TRADEMARKS BY GROUPS AND SERVICE BODIES](#)

Use by individual NA members or others

[Policies in the this or other Intellectual Property Bulletins](#) ~~does not create any other right or claim by the user, do not grant individual NA members or those outside NA permission to reproduce or use NA trademarks or other intellectual property. Individual NA members or others who wish to~~ ~~any~~[use NA's trademarks or copyrighted recovery literature should write directly to Narcotics Anonymous World Services, Inc..](#)

Use by NA groups and service bodies

[The policies below outline how NA groups and service bodies \(registered with Narcotics Anonymous World Services, Inc. may use NA's trademarks.](#)

[Some of the NA Fellowship's registered trademarks are: the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, the original NA group logo, and the PR "stamp" logo, all shown below:](#)



Policies for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. fellowships marks under The Narcotics Anonymous name or trademarks should not be used by an NA group or service body in any way that would imply affiliation, legal liability, or financial responsibility by or to another part of the Fellowship, service structure, or outside enterprise. That means that we should not use the Fellowship's trademarks, name, or logos:

- in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any theory of outside enterprise;
- in conjunction with any law, fact, or equity enforcement, political, medical, or religious slogans, themes, or other related materials;
- in a manner as to possibly offend or disrespect the sensibilities of other organizations, groups, or NA as a whole; or
- in any manner that could draw us into public controversy.

“NA Fellowship Approved” trademark

The “NA Fellowship Approved” trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference. Literature with this trademark is typically the only type of literature read in NA meetings. The “NA Fellowship Approved” trademark is only used by Narcotics Anonymous World Services, Inc. and may not be used by any NA group, service body, or any others, on any other materials.



Marking trademarks

The symbol ® should be placed to the right of all registered NA trademarks every time any of them are reproduced or used, whenever possible. By doing so, we are showing that these trademarks are legally owned or registered. This is one way in which we help preserve the Fellowship's legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group or service body has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the Fellowship can later be used to benefit a private individual or an outside business enterprise.

This is the document identified by name in the Fellowship Intellectual Property Trust Operating Rules, Article V, Section 1. It was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference as Trustor of the Fellowship [Intellectual Property Trust on 27 April 1993](#), and revised by the regional delegates at the World Service Conference on [30 April 1997](#) and [27 April 1998](#). It may be changed only by the Trustor.

To register, or for more information, contact NA World Services,
PO Box 9999, Van Nuys, CA 91409 USA, Tel: (818) 773-9999, Website: www.na.org.

NA Intellectual Property Bulletin #1 was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference on 27 April 1993, applicable as of 1 May 1993. It was amended at the World Service Conference in 1997 and 1998. This bulletin supercedes all previous Bulletins and policies pertaining to the use of copyrighted literature and registered trademarks ~~and service marks~~ by NA groups, service boards, and committees.

Addendum E

Intellectual Property Bulletin #1 Current Text

Internal Use of NA Intellectual Property

A statement of the NA Fellowship's policy on the reprinting of copyrighted NA recovery literature and the use of registered NA trademarks and service marks by NA groups, service boards, and committees.

NA Intellectual Property Bulletin #1 was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference on 27 April 1993, applicable as of 1 May 1993. It was amended at the World Service Conference in 1997 and 1998. This bulletin supercedes all previous Bulletins and policies pertaining to the use of copyrighted literature and registered trademarks and service marks by NA groups, service boards, and committees.

The Fellowship Intellectual Property Trust (FIPT) describes in detail how NA's name, trademarks, and recovery literature are protected and administered by Narcotics Anonymous World Services, Inc. (NAWS). It covers NA's name, trademarks and recovery literature in all forms, including translations, and all mediums, whether printed, electronic and any other media that may be developed in the future. Additional guidelines, contained in this and the other Intellectual Property Bulletins, for the use of NA's intellectual properties by the fellowship are presented as an adjunct to the FIPT. The guidelines are based partly on legal considerations and partly on the nature of NA. By following these simple steps, the fellowship will help ensure that NA's name, trademarks, and recovery literature will always be available to fulfill our primary purpose.

All matters not specifically addressed by the Intellectual Property Bulletins will be considered under the conditions of the Fellowship Intellectual Property Trust. Any questions or concerns about the Bulletins should be directed to NA's World Service Office.

This Bulletin reflects the policy affecting the use of NA intellectual property within the NA Fellowship. Use of the fellowships trademarks and recovery literature is a commitment to comply with these Guidelines. Usage inconsistent with the Guidelines is improper. Usage disputes are dealt with in Intellectual Property Bulletin #5.

Use by NA groups

These Guidelines outline the appropriate uses of NA logos and recovery literature by NA groups. The Guidelines also lay out criteria a group can use to avoid improper use. A description of the NA group--its nature, function, and role in the NA Fellowship--can be found in current NA service manuals. You are encouraged to review those sections describing groups prior to attempting use of the Guidelines described below.

Use by NA service boards and committees

Service boards and committees created directly or indirectly by NA groups may use NA logos and recovery literature in the ways described in these Guidelines so long as they register with NA World Services.

Use by individual NA members or others

Guidelines, in this or other Intellectual Property Bulletins do not grant individual NA members or those outside NA permission to use NA trademarks or intellectual property. Individual NA members or others who wish to use NA's trademarks or copyrighted recovery literature should write directly to NA World Services.

GUIDELINES FOR USE OF NA TRADEMARKS

Some of the NA Fellowship's registered trademarks are: the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, and the original NA group logo, all shown below:



Guidelines for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. The Narcotics Anonymous name or trademarks should not be used by an NA group, service board or committee in any way that would imply legal liability or financial responsibility by or to another part of the fellowship, service structure, or outside enterprise.

Narcotics Anonymous trademarks should not be used in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise.

Narcotics Anonymous trademarks should not be used in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials.

Narcotics Anonymous trademarks should not be used or displayed in such a manner as to possibly offend or disrespect the sensibilities of other organizations, groups or NA as a whole.

Narcotics Anonymous trademarks should not be used in any manner that could draw us into public controversy.

Narcotics Anonymous trademarks should not be used on locally developed recovery literature.

"NA Fellowship Approved" trademark

The "NA Fellowship Approved" trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference. The "NA Fellowship

Approved" trademark may not be used on any other materials.



Marking trademarks

Either the capital letter "R" or a "TM" should be placed inside a small circle to the right of all NA trademarks every time any of them are used. By doing so, we are showing that these logos are legally owned or registered trademarks. This is one way in which we help preserve the fellowship's legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group, service board, or committee has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the fellowship can later be used to benefit a private individual or an outside business enterprise.

GUIDELINES FOR REPRODUCTION OF NA RECOVERY LITERATURE

NA World Services acts as the publisher of all NA Fellowship-approved recovery literature. As such, it has been entrusted with the responsibility to obtain copyright protection for these items on behalf of the fellowship. This ensures that the fellowship's message as presented in our books and pamphlets is not tampered with.

Narcotics Anonymous World Services is largely dependent on the income generated from the sale of NA recovery literature. This income is used to cover the costs of publishing as well as the expenses associated with other services provided to the World Service Conference and the NA Fellowship-at-large. A large part of NA World Service's income comes from NA groups who purchase recovery literature to distribute at their meetings. Many groups consider their purchase of NA Fellowship-approved recovery literature as one way in which they contribute to the unity and growth of NA as a whole.

Use by NA groups

As a general rule, no one has the authority to reproduce NA Fellowship-approved recovery literature without prior written permission from Narcotics Anonymous World Services. However, given the nature of our fellowship, our experience indicates that NA groups *and only NA groups* should have the authority to reproduce fellowship-approved recovery literature in certain instances. When preparing to reproduce NA Fellowship-approved recovery literature, NA groups should discuss the Fourth Tradition and follow all of these general guidelines:

1. An NA group should only reproduce NA Fellowship-approved recovery literature when it has a clear need to do so.
2. NA Fellowship-approved recovery literature reproduced by an NA group should be distributed only within that group. Such materials should always be given away free of charge; they should never be sold to generate income.
3. The text of NA Fellowship-approved books and pamphlets reproduced by an NA group should not be altered or modified in any way.
4. The copyright for the item being reproduced should be shown prominently as follows: "Copyright © [year of first publication], Narcotics Anonymous World Services, Inc. Reprinted by permission. All rights reserved."

Use by registered NA service boards and committees

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Addendum F

List of Published Materials

Showing Categories and Translations

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Languages Published as of 15 November 2019	
Basic Text	X			1983/2008	32	AF, AR, BG, BM, CH, CR, DK, EN, FA, FI, GE, HE, HI, HU, ID, IS, IT, JP, LT, NL, NR, PB, PL, PO, RU, SP, SW, TU, FR, GR, TH, LV	
Just For Today	X			1992/2008	16	EN, SW, SP, RU, PO, NR, LT, JP, IT, HI, HE, GE, FR, FA, DK, PB	
It Works, How and Why	X			1993	17	EN, SW, SP, PO, PL, NR, JP, IT, HI, HE, GE, FR, FI, FA, DK, AR, PB	
Introductory Guide to NA	X			1992	20	EN, HU, PB, CR, DK, FA, FL, FI, FR, AR, GR, TU, IT, LT, NL, NR, PL, SP, SW, GE	
White Booklet	X			1976/1983	24	EN, JP, AN, ASL, BE, PB, FA, FL, FR, GE, GR, AF, IT, KO, LT, MT, NR, PO, RU, SL, SP, SW, TU, HI	
The Group Booklet	X			1990/2000	15	EN, SP, RU, PO, PL, NR, LT, IT, HU, HE, GE, FR, FA, DK, PB	
12 Concepts for NA Service	X			1992	14	EN, SW, SP, RU, PO, PL, NR, LT, IT, HU, GE, FR, FA, PB	
Miracles Happen		CA		1998/2002	2	EN, FA	
Behind the Walls	X			1990	13	EN, SW, SP, RU, PO, PL, NR, LT, JP, IT, HU, GE, FA	
In Times of Illness	X			1992/2010	10	EN, SP, PO, NR, IT, HE, GE, FR, FA, DK	
Working Step Four in NA	X			1988	16	EN, SP, RU, PO, PL, NR, MP, LT, IT, HU, GE, FR, FI, FA, DK, PB	
The Narcotics Anonymous Step Working Guides	X			1998	19	EN, IT, PB, DK, FA, FI, FR, HE, AR, HU, SW, JP, LT, NR, PL, PO, RU, SP, HI	
Sponsorship	X			2004	9	EN, SP, RU, NR, IT, GE, FR, FA, PB	
Living Clean	X			2012	8	EN, SW, SP, RU, NR, IT, FA, PL	
Guiding Principles	X			2016	3	EN, FA, SP	
IP #1 Who, What, How, and Why	X			1976/1986	55	EN, FI, LV, KN, JP, IT, ID, IS, HU, HI, HE, GR, AF, FR, MT, FL, FA, ET, DK, CR, CH, BG, PB, BE, AR, AN, GE, SP, OR, SR, CS, CT, KO, AM, UR, UA, TU, TH, TA, LT, SH, BM, SL, SK, RU, PA, PO, PL, NR, NE, NL, MP, ZU, SW, BN	
IP #2 The Group (IP)	X			1976/1998	26	EN, MP, PB, CR, DK, FA, FL, FI, FR, GE, HE, ID, AF, LT, KO, NL, NR, PL, PO, RU, SL, SP, SW, TH, UA, IT	
IP #5 Another Look	X			1985/1992	34	EN, FA, HU, HI, GR, GE, FR, AF, FL, JP, DK, CR, CH, PB, ASL, AR, FI, PO, KO, UA, TU, TH, SW, SP, ID, RU, IT, PL, NR, NL, LT, LV, CT, SL	
IP #6 Recovery & Relapse	X			1976/1986	38	EN, FL, AR, HU, HI, HE, GR, GE, IT, FI, JP, FA, DK, CR, CH, BG, PB, BE, FR, RU, CT, KO, UA, TU, TH, SW, ID, SL, ZU, PO, PL, NE, NL, NR, MP, LT, SP, AN	
IP #7 Am I an Addict?	X			1983/1988	48	EN, FL, JP, IT, ID, IS, HU, HI, HE, GR, GE, AF, FI, LT, FA, ET, DK, CR, CH, BG, PB, BE, AR, FR, SL, OR, CT, KO, UA, TU, TH, TA, SW, KN, SP, LV, SK, RU, PO, PL, NR, NE, NL, MP, BM, ZU, SH	
IP #8 Just For Today (IP)	X			1983	40	EN, FA, ID, IS, HU, HI, GR, GE, FR, AN, FL, LV, DK, CR, CH, BG, PB, BE, AR, FI, PO, KO, UA, TU, TH, SW, SH, SP, IT, RU, JP, PL, NR, NE, NL, MP, BM, LT, CT, SL	
IP #9 Living the Program	X			1983	30	EN, KN, AN, BE, PB, DK, FA, FI, FR, GE, HE, HI, HU, AF, IT, TU, LT, MP, NL, NE, NR, PL, PO, RU, SP, SW, TH, IS, AR, ZU	
IP #11 Sponsorship	X			1983/2004	39	EN, FA, HU, HI, HE, GR, GE, FR, AF, FL, JP, ET, DK, CR, CH, PB, AR, AN, FI, PL, KO, UA, TU, TH, SW, SP, SL, ID, PO, IT, NR, NE, NL, MP, LT, LV, CT, RU, TA	
IP #12 Triangle of Self-Obsession	X			1983	27	EN, IT, AN, AR, PB, BG, DK, FA, FI, FR, GE, HE, AF, HU, TH, LV, LT, MP, NL, NR, PL, PO, RU, SK, SP, SW, HI	

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Languages Published as of 15 November 2019	
IP #13 By Young Addicts for Young Addicts	X			2008	23	EN, LT, PB, DK, FA, FI, FR, GE, HE, HU, AN, IT, KO, NL, NR, PL, PO, RU, SP, SW, TH, TU, IS	
IP #14 One Addict's Experience...	X			1983/1992	34	EN, FL, AN, IS, HU, GR, GE, IT, FI, JP, FA, DK, CR, CH, PB, AR, FR, PO, KO, UA, TU, TH, SW, ID, RU, CT, PL, NR, NL, MP, LT, LV, SP, SL	
IP #15 Pl and the NA Member	X			1991	22	EN, MP, BE, PB, DK, FA, FR, GE, HU, IS, AN, LT, TH, NL, NE, NR, PL, PO, RU, SP, SW, IT	
IP #16 For the Newcomer	X			1983	43	EN, FL, AN, ID, IS, HU, HI, HE, GR, GE, JP, FI, KN, FA, ET, DK, CR, CH, PB, BE, AR, FR, PO, CT, KO, UA, TU, TH, SW, SH, SP, IT, RU, ZU, PL, NR, NE, NL, MP, BM, LT, LV, SL	
IP #17 For those in Treatment	X			1991	15	EN, SW, SP, RU, PO, PL, NR, LT, IT, ID, HU, GE, FA, DK, PB	
IP #19 Self Acceptance	X			1985	37	EN, FL, AN, HU, HI, HE, GR, GE, IT, FI, JP, FA, DK, CR, CH, BG, PB, AR, FR, PO, KO, UA, TU, SW, SH, SP, ID, RU, CT, PL, NR, NE, NL, MP, LT, LV, SL	
IP #20 H&I and the NA Member	X			1986/2001	20	EN, LT, PB, DK, FA, FR, GE, HU, IS, AN, LV, SW, MP, NL, NE, NR, PL, RU, SP, IT	
IP #21 The Loner	X			1986	13	EN, SW, SP, RU, PO, PL, NR, IT, HU, GE, FI, FA, PB	
IP #22 Welcome to NA	X			1986/1987	43	EN, FA, AF, IS, HU, HI, HE, GR, GE, FR, IT, FL, JP, DK, CR, CH, BG, PB, BE, AR, AN, FI, PO, CT, KO, UA, TU, TH, SW, SH, SP, ID, RU, ZU, PL, NR, NE, NL, MP, BM, LT, LV, SL	
IP #23 Staying Clean on the Outside	X			1987/1988	35	EN, FL, IS, HU, HI, GR, GE, AN, FI, LV, FA, DK, CR, CH, PB, AR, FR, PO, KO, UA, TU, TH, SW, SP, IT, RU, JP, PL, NR, NL, BM, LT, CT, SL, ID	
IP# 24 Money Matters: Self Support in NA	X			2010	21	EN, IT, AN, AR, PB, DK, FA, FI, FR, GE, HU, SW, LT, MP, NL, NR, PL, PO, RU, SP, HE	
IP #26 Accessibility for Those with Additional Needs	X			1998	9	EN, SP, RU, NR, IT, GE, FA, DK, PB	
IP #27 For Parents or Guardians of Young People in NA	X			2008	15	EN, TU, SP, RU, PL, NR, NL, IT, HU, GE, FR, FA, DK, PB, PO	
IP# 28 Funding NA Services		CA#	SP in 2007	2010	16	EN, TU, SP, RU, PO, PL, NR, NE, NL, IT, GE, FR, FA, DK, PB, AR	
IP#29 An Introduction to NA Meetings	X		SP in 2008	2014	17	EN, TU, SP, RU, PO, PL, NR, NL, IT, HE, DK, CH, PB, AR, AF, JP, FA	
Public Relations Material							
NA: A Resource in Your Community*		CA		1991/2016	14	EN, TU, SW, SP, RU, PO, PL, NR, LT, IT, FR, FA, BG, PB	
Narcotics Anonymous and Persons Receiving Medication Assisted Treatment			X	2016	5	EN, DK, SP, SW, FA	
Membership Survey**			X	2006/2019	11	EN, SW, SP, PL, IT, ID, HU, GE, FR, PB, FA	
Information about NA**			X	2006/2019	15	EN, CT, SW, SP, NR, IT, ID, HU, GR, GE, FR, CH, AR, FA, PB	
European Membership Survey**			X	2010/2019	1	EN	
Russian Membership Survey**			X	2019	1	RU	

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Code	
						Language	Published
as of 15 November 2019							
Service Tools							
Hospitals & Institutions Handbook		CA#		1987/1989	2	EN, FA	AF Afrikans
Guide to World Services in NA		CA#		2000/2018	2	EN, SP	AM Amharic
A Guide to Local Services in NA		CA#		1997	4	EN, GE, SP, FA	AN Anglicized Arabic
Public Relations Handbook		CA#		2006	3	EN, SP (DRAFT), FA	AR Arabic
Literature Committee Handbook		CA#		1983/1987		EN	ASL American Sign Language
Handbook for NA Newsletters		CA#		1985		EN	BE Bengali
A Guide to Phoneline Service		CA#		1986	2	EN, FA	BG Bulgarian
Treasurer's Handbook		CA#		1985/2003	3	EN, IT	BM Bahasa Melayu
Group Treasurer's Workbook		CA#		1988, 2003		EN, LT, SP	BN Bengali/Bangladesh
Outreach Resource Information		CA#		1998		EN	CH Chinese
Institutional Group Guide		CA#		1998	2	EN, PB	CR Croatian
Additional Needs Resource Information		CA#		1998		EN	CT Chinese Traditional
Group Business Meetings, SP			X	2007	11	EN, SW, SP, PO, PL, NR, IT, HE, FR, FA, FI	DK Danish
Group Trusted Servants: Roles and Responsibilities, SP			X	2007	13	EN, SW, SP, RU, PO, NR, LT, IT, FR, FI, FA, PB, AR	ET Estonian
Disruptive and Violent Behavior, SP			X	2007	17	EN, IT, PB, FA, FI, FR, GE, AR, HE, SW, LT, NR, PL, PO, RU, SP, GR	FA Farsi
NA Groups and Medication, SP			X	2007	14	EN, SW, SP, PO, NR, IT, HU, HE, GR, GE, FR, FI, FA, DK	FI Finnish
Principles and Leadership in NA Service, SP			X	2008	6	EN, SP, NR, IT, GE, FA	FL Filipino
Social Media and Our Guiding Principles, SP			X	2011	12	EN, SP, RU, PO, NR, IT, GE, FR, FI, DK, FA, PL	FR French
PR Basics			X	2010	3	EN, GE, SP (DRAFT)	GE German
H&I Basics			X	2010	3	EN, GE, SP (DRAFT)	GR Greek
Translations Basics			X	1999/2018	2	EN, SP (DRAFT)	HE Hebrew
Phoneline Basics			X	2018	1	EN	HI Hindi
Planning Basics			X	2011	3	EN, SP (DRAFT), FA	HU Hungarian
From the Local Tools project by WSC 2020: 1. CDM Basics 2. Serving NA in Rural & Isolated Communities 3. GSR Basics 4. possibly, FD Basics			X				ID Indonesian
From the Conventions & Events project by WSC 2020: 1. The Program Committee and Developing the Program 2. Money Management 3. Contracts and Negotiations 4. Committee Structure and Accountability			X				IS Icelandic
* Statistics and local information for these items can be amended with notification to NAWS. These items are routinely updated with WB approval and without CP review. + Items approved with only WB approval							IT Italian
							JP Japanese
							KN Kannada
							KO Korean
							LT Lithuanian
							LV Latvian
							MP Manipuri
							MT Maltese
							NE Nepali
							NL Netherlands
							NR Norwegian
							OR Odia
							PA Punjabi
							PB Portuguese/Brazil
							PL Polish
							PO Portuguese
							RU Russian
							SH Swahili
							SK Slovak
							SL Slovenian
							SP Spanish
							SR Serbian
							SW Swedish
							TA Tamil
							TH Thai
							TU Turkish
							UA Ukrainian
							UR Urdu
							ZU Zulu

The Twelve Traditions of Narcotics Anonymous

1. Our common welfare should come first; personal recovery depends on NA unity.
2. For our group purpose there is but one ultimate authority—a loving God as He may express Himself in our group conscience. Our leaders are but trusted servants, they do not govern.
3. The only requirement for membership is a desire to stop using.
4. Each group should be autonomous except in matters affecting other groups or NA as a whole.
5. Each group has but one primary purpose—to carry the message to the addict who still suffers.
6. An NA group ought never endorse, finance, or lend the NA name to any related facility or outside enterprise, lest problems of money, property, or prestige divert us from our primary purpose.
7. Every NA group ought to be fully self-supporting, declining outside contributions.
8. Narcotics Anonymous should remain forever nonprofessional, but our service centers may employ special workers.
9. NA, as such, ought never be organized, but we may create service boards or committees directly responsible to those they serve.
10. Narcotics Anonymous has no opinion on outside issues; hence the NA name ought never be drawn into public controversy.
11. Our public relations policy is based on attraction rather than promotion; we need always maintain personal anonymity at the level of press, radio, and films.
12. Anonymity is the spiritual foundation of all our Traditions, ever reminding us to place principles before personalities.

The Twelve Concepts of Narcotics Anonymous

1. 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.
2. The final responsibility and authority for NA services rests with the NA groups.
3. The NA groups delegate to the service structure the authority necessary to fulfill the responsibilities assigned to it.
4. Effective leadership is highly valued in Narcotics Anonymous. Leadership qualities should be carefully considered when selecting trusted servants.
5. For each responsibility assigned to the service structure, a single point of decision and accountability should be clearly defined.
6. Group conscience is the spiritual means by which we invite a loving God to influence our decisions.
7. 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.
8. Our service structure depends on the integrity and effectiveness of our communications.
9. All elements of our service structure have the responsibility to carefully consider all viewpoints in their decision-making processes.
10. Any member of a service body can petition that body for the redress of a personal grievance, without fear of reprisal.
11. NA funds are to be used to further our primary purpose, and must be managed responsibly.
12. In keeping with the spiritual nature of Narcotics Anonymous, our structure should always be one of service, never of government.