MOVING FORWARD...
TOWARD OUR VISION

2004 CONFERENCE APPROVAL TRACK MATERIAL

PROPOSED TRAVEL REIMBURSEMENT POLICY
CONFERENCE CYCLE 2004–2006

This package will attempt to answer most questions you may have concerning reimbursement and advances for expenses you may incur while fulfilling your world service commitment.

Enclosed you will find a copy of the "World Services Travel Guidelines." You should attempt to familiarize yourself with this document. The most commonly asked questions are addressed here.

Seven Basic Rules To Keep In Mind

1. All requests for funds must be submitted on a "Reimbursement Request." A copy is included.

2. All reimbursement requests must be submitted no later than ninety days after the last travel day of a trip or event. Submissions after ninety days will be automatically denied. Any advances not accounted for within this time period must be returned. Please note that any advances not accounted for will become accounts receivable and reported to the conference.

3. You will only be reimbursed for travel on the days you were scheduled to travel or attend an event. International travelers will frequently need an extra day on either end of an event. This is anticipated. All other extensions must receive prior approval on a case-by-case basis or they will not be reimbursed.

4. All requests must include a receipt for each reimbursable item, with the exception of meals.

5. Send all original documents (including receipts) to the WSO.

6. Travel expenses are typically reimbursable for portal-to-portal expenses.

7. The Internal Revenue Service does not allow for personal phone calls as a reimbursable expense.

MEALS

Maximum meal and tip allowance is $50 US per day (including travel days). If you are traveling outside the US, you will be notified prior to departure of the approved Daily Meal and Tip Allowance for the particular country to which you are traveling. This is the maximum you will be advanced/reimbursed for meals and tips. It is not necessary to save or turn in your meal receipts.

TRAVEL

You must turn in receipts for all travel expenses; airfare, cab fare, shuttle service, mileage, or other ground transportation, parking, and tolls are reimbursable. If normal receipts are unavailable, a hand-written, signed receipt must be included. It is generally expected that the most economical means of transportation safely available will be used. Occasionally, travelers may wish to pool their resources and rent a car. This can frequently save money; however, in

most cases this must receive prior approval. Please note that when using your own car, you must include your odometer reading from the point of origin to the point of destination and the purpose of the trip on the reimbursement request. This reimbursement request will serve as the necessary receipt for mileage reimbursement. The reimbursable mileage rate for 2004 is $0.36 per mile.

For meetings held at the WSO-Chatsworth, ground transportation, including car rentals, do not require prior approval. The maximum allowable ground transportation from Los Angeles area airports is $30.00 per person each way, including tips. Any ground transportation that exceeds this amount requires prior approval.

Travel Reservations Procedure

Air transportation will be reserved through the WSO or its agent whenever possible. Travelers making reservations through their own travel agents must fax or email a copy of their itinerary to the WSO at the time the ticket is booked. All travelers are required to make their travel arrangements at least twenty-one days prior to the scheduled travel. In cases when this is not possible, travelers must request special consideration for their travel by notifying the WSO prior to the twenty-one day deadline. The WSO will then ask for a decision from the designated member of the World Board. Their decision may be any of the following:

1. To approve the travel request

2. To ask the traveler to pay the difference between the ticket price and the twenty-one day advance purchase price

3. To offer an alternative mode of travel including but not limited to the use of other airlines, or air travel certificates

4. To reject the travel request

SAMPLE REIMBURSEMENT REQUEST

The following scenario is examined: Sam (could be Samantha) Service is funded to attend a workshop at a zonal forum meeting in Dallas for three days. Sam lives in Wisconsin. Sam purchases airline tickets (after checking with the WSO travel agent for a quoted rate) from a local travel agent. *Note:* In most cases, the WSO travel agent will be the least expensive. However, occasionally, a local agent may be able to save money. A local agent should only be utilized as a means to secure a lower fare, never as a convenience. Remember to always purchase your tickets a minimum of twenty-one days prior to departure in order to qualify for the lowest fare. Sam then drives to the airport (twenty-seven miles from home) and parks at the economy parking lot. Usually, the hotel room is booked by the WSO; however, that was not possible on this occasion. The shuttle to the hotel costs $14.00, and Sam tips the driver $2.00. Sam attends the event, imparting great wisdom to the local fellowship, returns by shuttle ($16 with tip) to the airport and flies home. The parking bill is $21. Sam saves all receipts. An advance of $150 was requested and granted. The meal allowance is $50/day. What is reimbursable, and how does Sam fill out a request?

Refer to the sample request attached.
- Airfare—yes, with receipt and itinerary faxed to the WSO.
- Drive to airport—yes; the beginning and ending odometer readings and the purpose of the trip must be provided. Compute mileage at $0.36 per mile (27 X $0.36 = $9.72).
- Shuttle (with tip)—yes, with receipt.

- Meals—Maximum meal and tip allowance is $50 per day (includes travel days); no receipts needed.
- Hotel—yes, with receipt. *Note*: Only room rate and tax is reimbursable; anything else charged to your room (meals, movies, phone calls, etc.) is your responsibility. Single accommodations may be planned to accommodate travelers from different time zones and/or individual personal habits like smoking, etc. This is arranged in the meeting planning and may not be done by the individual traveler. Any travelers with other special requests for single accommodations or plans to stay with a non world service traveler will be expected to pay for one half of the room. The WSO staff will let travelers know how to arrange payment.
- Parking—yes, with receipt.

Fill out the Reimbursement Request as shown and mail the signed original to the WSO. You may fax a copy to the WSO to help expedite your approval, but all originals *must* go to the office.

After approval, the balance of Sam's request (after deducting the $150 advance) is mailed in the form of a check on the next weekly run. Because Sam filled out the request correctly and included the proper documentation (receipts), within a week (two at the most) Sam has been reimbursed for the above expenses.

ADVANCES

If you receive an advance, you MUST submit a reimbursement request, even if no money is due you. This is done to account for the funds. Include any unused funds (by check). No funds will be advanced or reimbursed to you until any previous advances that are outstanding for ninety days or more have been accounted for. Again, please note that any advances not accounted for will become an account receivable and will be reported to the conference.

A WORD TO THE WISE

If, after reading the World Service Travel Guidelines and this package, you are uncertain about some particular item and whether or not it is or would be reimbursable, please contact the WSO for clarification. A good rule of thumb to use is this: if something is not addressed clearly in the World Service Travel Guidelines, it most likely will require prior approval if you plan on requesting reimbursement. As with all policies, there are times when travelers may need to seek an exception. The World Board Executive Committee has the ability to consider these requests on a case-by-case basis.

We hope this has been helpful. Again, please submit your requests as soon as possible. It will help you be reimbursed more quickly and greatly aid in the administration of our travel budget.

Reimbursement for Non-Travel Trusted Servant Expenses

Most expenses incurred in order to fulfill your service commitment are reimbursable. All require receipts and must be submitted within ninety days of purchase (in the case of supplies) or date of bill (phone/fax).

2004–2006 Telephone & Fax Policy

The IRS does not allow personal phone calls as a reimbursable expense. Only telephone calls that are directly related to a specific business purpose are a reimbursable expense. Telephone and fax expenses incurred by world service trusted servants in the course of authorized or necessary world service business are reimbursable using the following procedure.

♦ Allocations are determined by project, activity, or assignment. These allocations will be for monthly expenditures unless otherwise authorized.
♦ Telephone credit cards may also be issued when authorized.
♦ All phone and fax expenses must be substantiated using a phone log sheet. Phone log sheets should include the purpose of the call, dates, approximate time, cost of call (including tax), and phone/fax number of the party being called. Total the cost of all calls and submit for reimbursement.
♦ Individuals' phone logs must be submitted to the WSO each month. (In cases where telephone billing does not occur on a monthly basis, the log and bill is to be sent to the WSO within thirty days of the date of the bill.)
♦ If you have been approved by world services to install a dedicated line for a fax machine, the installation and the monthly line charge are reimbursable (with receipts). These telephone lines are provided to ensure reliable communications with world services and should not be used for other purposes. Be careful not to include the charge for any enhanced plans (i.e., caller ID, call waiting, etc.), which are frequently included in the monthly line charge.
♦ Whenever possible, members of WS leadership should utilize the 1-800 number for all telephone calls to the WSO.

MISCELLANEOUS

Postage, copy/fax paper, fax cartridges, etc. are reimbursable. Submit under "other" on a "Reimbursement Request" and include receipt(s). These expenses must fall within the project, board, or committee budget allocation as stated above.

SAMPLE REIMBURSEMENT REQUEST

Name: Sam Service   Date of Request: 05/10/2004

Event/Purpose: Zonal Forum Workshop   Dates of Event: 6/04–6/06/04

Location: Dallas, Texas, USA

Maximum meal and tip allowance is $50 per day

3   # of Days X $50.00 $150.00

Days	Travel	Lodging	Meal/Tip	Other	Notes	Daily Total
Thursday						
Friday	$292.00 $9.72* $30.00**		$30.00		Airfare *27 miles **Shuttle	$361.72
Saturday			$40.00			$40.00
Sunday	$9.72* $30.00** $21.00***	$181.50	$35.00		*27 miles **Shuttle ***Parking	$277.22
Monday						
Tuesday						
Wednesday						
Totals	$392.44	$181.50	$105.00			$678.94
					Advance	$150.00
					Balance	$528.94

Make & Model of Vehicle	2002 Ford Taurus	License Number	123XXX
Odometer reading at beginning of trip	62300	Odometer reading at end of trip	62354

I hereby certify the above is true and correct.

Signed _____   Date _____

Approved _____   Date _____

WORLD SERVICES PARTICIPATION REQUEST FORM

This form should be completed and submitted when making a request for world services participation at an event. This information helps world services plan more effectively.

Name of Event:

Type of Event: (i.e., zonal forum meeting, *Conference Agenda Report* workshop, multi-regional PI workshop, regional assembly, etc.)

Dates/Time of Event:

Contact Person:

Name:

Phone:

What Region or Regions will be in attendance?

Do you have letters of intention from the regions that plan to attend?
☐ Yes   ☐ No
If yes, please provide us with copies of the letters.

Estimated number of attendees: _____

In which portion of the event will world services be participating? If possible, give approximate date and time traveler(s) will be participating—including any specific issues you would like addressed. Please attach a tentative agenda for the entire event.

Closest airport to the event: _____

Will the traveler(s) be picked up at the airport?   ☐ Yes   ☐ No
If no, what is the distance from the airport to the event? _____

Closest hotel to the event:_____
(if event is not held in a hotel)

Driving time from downtown area of city to event: _____

Will the hosting region/forum/committee be making a contribution to the traveler(s) expenses (airfare, meals, lodging)?   ☐ Yes   ☐ No
If yes, please indicate the amount: $_____ for

☐ Airfare   ☐ Meals   ☐ Lodging

If you are providing lodging, what is the name and phone number of the person on the committee responsible for making reservations?

Name:

Phone:

WSC 2004 Seating Report
From the World Board

We have the responsibility of forwarding recommendations regarding seating new regions at the World Service Conference. In accordance with that responsibility, this report addresses the seating requests received over the last conference cycle and includes our recommendations regarding those requests. This seating process adopted at WSC 2000 is relatively new. Given that, we are providing recommendations regarding seating new regions at WSC 2004 for participation at the 2006 WSC. We suggest reviewing *Criteria for Recognition of New Conference Participants* from *A Guide to World Services* for further details regarding the seating process.

We want to take this opportunity to thank all those involved, including trusted servants from the requesting regions and seating workgroup members. The seating workgroup for this cycle included David J, World Board member; returning workgroup members Seth S, RD Rio Grande Region; Michael C, former RD Spain; and new to the workgroup, Jose Manuel C (Pepe), RD Mexico.

As a part of the ongoing communication process with these regions, we used a questionnaire titled WSC Seating Information Profile, which is a series of objective and subjective questions forwarded to the regions as a way to gain information about those NA communities. Once the completed profiles were reviewed, the requesting regions were then asked a second round of more focused follow-up questions. The workgroup came to consensus regarding the requests and reported that outcome to us. We agreed with each of the recommendations the workgroup made. In turn, we now forward those recommendations to the conference for your consideration.

Three regions requested seating this cycle; they included Chile, Occidente (Mexico), and Venezuela. The Poland region initially requested consideration, but withdrew their request mid-cycle because they felt that to pursue seating at this time might divert their focus from local service development. We hope that once they have developed their local services further, they will return for consideration. With that said, below are our recommendations.

Chile:

We recommend seating the Chile Region. Chile meets the objective criteria for seating. There was some concern regarding the structure of this region. Because of the challenges that the service structure faces in Chile, including vast geographic distances, they seem to function as both an area and a region for the groups there. However, we are confident that the region is stable and services are being supplied to the groups. Since Chile has not been represented at the conference, we are looking forward to their participation and input.

Occidente:

We do not recommend seating the Occidente Region. According to all of the information supplied by this region, they do not meet the base criteria because they have not been delivering services for three years prior to requesting seating. This policy, created with the

requesting region's best interest in mind, is largely to ensure that a region is stable and focused on their local needs before expanding their focus to the WSC.

Regardless of their seating status, we support and applaud Occidente Region's efforts in carrying the NA message of recovery. We contacted the Occidente RD and strongly suggested that they not be discouraged by our decision, and we recommend reapplying for seating. They, along with other non-seated regions, will receive WSC communications.

Venezuela:

We recommend seating the Venezuela Region. Upon reviewing the available information, it is clear that this region exceeds all of the criteria for consideration. We are confident that the region is well developed and ready to contribute to the WSC. We look forward to their participation.

As a part of this report we are including regional profiles for each of the three regions. Complete questionnaires from each requesting region are available upon request. Again, we want to thank those involved in this process. We look forward to your decisions regarding these matters.

Regional Profile: Chile

- The region began in 1999.
- The region has approximately twenty groups representing seventy meetings.
- There is one area in the region.
- Currently, there are approximately ninety-one H&I meetings annually.
- Both H&I and PI committees have been functioning since 1999.
- There has been a general service office in this community since 1995.
- An annual convention has been held since 1999.

Regional Profile: Occidente

- The region began in August 2000, splitting from the Mexico Region.
- Service delivery began January 2001.
- The region has approximately fifty groups representing 350 meetings.
- There are four areas in the region.
- Currently there are approximately fifteen H&I meetings annually.
- H&I committee has been functioning since 1998.
- PI committee has been functioning since 2001.
- There has been a general service office in this community since 1999.
- An annual convention has been held since 2000.

Regional Profile: Venezuela

- The region began in 1995.
- The region has approximately forty groups representing 100 meetings.
- There are three areas in the region.
- Currently there are approximately 400 H&I meetings annually.
- Both H&I and PI committees have been functioning since 1992.
- There has been a general service office in this community since 1993.
- An annual convention has been held since 2002.

Narcotics Anonymous World Services

STRATEGIC
PLAN

2004 – 2006 Conference Cycle

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NA World Services Vision Statement

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

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

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

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NAWS Long-Term Goals

In a continuous effort to realize our vision, NA World Services strives to achieve the following long-term goals:

CONCERNING THE SERVICE WE PROVIDE	◆ To be a trustworthy leader with the foresight to identify trends and issues affecting the fellowship and the ability to develop innovative solutions to address them. ◆ To be a reliable resource for information about Narcotics Anonymous recovery and about access to our recovery process. ◆ To represent the interests and concerns of Narcotics Anonymous and the issues that affect the fulfillment of our vision. ◆ To create and deliver products and services that meet changing fellowship needs. ◆ To foster a worldwide community of members with unity of purpose and a keen sense of mutual accountability and support.
CONCERNING HOW WE OPERATE	◆ To build productive partnerships throughout NA to fulfill our vision: relationships with other components of the service structure and local communities, and between board and staff. ◆ To build and sustain cooperative relationships with other organizations and entities that address issues of addiction in order to raise awareness of Narcotics Anonymous as a viable option for recovery. ◆ To be a model of professionalism, setting high standards for service, efficiency in operations, and an unwavering focus on the needs of those we serve. ◆ To be responsive and accessible, inviting involvement and dialogue, and ensuring efficient delivery of products and services. ◆ To be an organization characterized by integrity and consistency, whose words and actions are driven by principles. ◆ To be a sound organization with the structure and capacity, human and financial, to achieve our goals and priorities.

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How do we get there?

The diagram below illustrates how we get from our vision statement to an actual project plan and how the steps are connected. Each project is inspired by our vision, "our vision is our touchstone, our reference point, inspiring all that we do."

OUR VISION

⬇
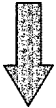
LONG-TERM GOALS
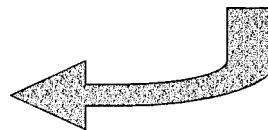
↳ *KEY RESULT AREAS*

↳ *OBJECTIVES*

↳ *APPROACHES*

↳ *PROJECT PLANS*

PRIORITIES ⬅

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NAWS 2004 Strategic Plan
Introduction

Purpose and Use

The 2004 Strategic Plan for NA World Services is the vehicle that will help us move forward toward our vision. The plan contains the long-term goals and interim objectives we need to reach so that *"every addict in the world has the chance to experience our message..."* Each conference cycle, the plan will also outline the work we would like to accomplish during the next two years in order to move closer to those objectives and goals, but it will not include specific actions or timetables. These specifics will be detailed in the related project plans. We will use this plan to a) guide decision-making and deliberation of related strategic issues, b) establish and align our resources with our priorities, and c) evaluate progress toward our goals. The plan helps us focus on our common goals not our differences or individual agendas and keeps us focused on NA principles.

This plan represents the work and discussions of the World Board and NAWS staff over the past couple of conference cycles. However, the strategic plan belongs to all of us, and the objectives and approaches it outlines have been shaped through discussions between board members, delegates at the last WSC and other service events, and interested members of the fellowship through worldwide workshops and face-to-face and written contacts. The sessions at this conference will have the most significant impact on the strategic plan for the next cycle (2006–2008) as well as on the operational details of the projects we will undertake for the 2004–2006 cycle.

This is a huge shift in perspective for all of us. Our conferences often have been concerned with looking backward (at events of the last year or two) or with fine-tuning and small details. To plan strategically, we must think about the forest, not just the trees, and furthermore, we must think about the needs of the forest two years from now. The board has been challenged to change the way we look at and accomplish our work, and we look forward to WSC 2004 where we can meet this challenge together.

We need to review and analyze routinely the needs and interests of the fellowship, as well as relevant external influences, to determine how these changes affect our priorities and to ensure that we stay on course toward realizing our vision. The planning process is fluid and responsive, allowing us to address new trends and issues as they arise. We will revisit the plan each conference cycle to outline our work for the years ahead and make sure that the plan is keeping pace with our rapidly changing fellowship and the world-at-large.

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Definition of Terms

NA World Services Vision Statement
A compelling picture of the impact our fellowship is seeking to make through world services.

NAWS Values
Guiding principles, our traditions and concepts, that convey what we stand for and how the organization operates.

NAWS Long-Term Goals
Description of world services in a future state, when we are operating at a level of performance required to fulfill our vision statement.

Strategic Planning
A process by which change that will impact the organization's success in achieving its vision can be identified and managed.

Key Result Areas
Strategic areas that require change—*strategic* because they are based on an assessment of external and internal factors. Action taken in these areas will move us closer to fulfilling our vision.

Objectives
End results that must be accomplished within each key result area.

Approaches
Interim results that need to be achieved along the way to accomplishing our longer-term objectives and goals. These are the things we hope to achieve *within the next Planning/Conference Cycle*.

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Key Result Areas

To ensure progress toward NA World Services long-term goals, growth is critical in the following areas. Sound organizational management is critical to realizing the services that will help us achieve our vision. This document does not intend to outline the entire range of world services' work or goals, but instead to help demonstrate the connection between good management of NAWS and the realization of our vision. The key result areas focus on areas that need change or areas that drive new change. Service objectives are those areas of our work that directly relate to the fellowship as a whole, while the organizational objectives are those areas that are specific to the entity of Narcotics Anonymous World Services, Inc. The key result areas are:

<u>Service Objectives</u>

- **Communication**
- **Fellowship Support**
- **Recovery Literature**

<u>Organizational Objectives</u>

- **Leadership and Management**
  - **Resources**

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Objectives

Our strategic objectives, listed below, outline what we hope to accomplish within each key result area in order to move toward achieving our long-term goals. Below is a list of our objectives, followed by a more detailed explanation of the objectives and the approaches necessary to begin accomplishing them.

SERVICE OBJECTIVES

In order to achieve our vision, we must improve the quality of service we provide.

Key Result Area: Communication

Objective 1: Develop and disseminate information of high value to intended NA communities and/or service bodies.

Objective 2: Improve the effectiveness and efficiency of world services' communication with the fellowship.

Objective 3: Raise awareness and enhance the perception of Narcotics Anonymous as a credible program of recovery.

Key Result Area: Fellowship Support

Objective 4: Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.

Objective 5: Work to sustain and build all NA communities, recognizing their different levels of development.

Objective 6: Broaden availability of the Narcotics Anonymous message to a widely diverse membership and potential membership.

Key Result Area: Recovery Literature

Objective 7: Build a range of literature to meet the diverse needs of members and potential members.

Objective 8: Streamline and increase responsiveness of the literature development process to meet the needs of the fellowship.

ORGANIZATIONAL OBJECTIVES

Sound organizational management is crucial to improving those services.

Key Result Area: Leadership and Management

Objective 9: Effectively identify, cultivate, encourage, and support committed, qualified leaders for all levels of the service structure within the fellowship as a whole.

Objective 10: Refine NAWS structure to ensure it provides the foundation needed to carry out NAWS leadership and management roles and responsibilities at a high level of performance.

Objective 11: Continue to build the systems, tools, and operating culture necessary to support strategic management of NAWS.

Key Result Area: Resources

Objective 12: Ensure the long-term reliability of the NAWS income stream in order to carry out identified priorities and service.

Objective 13: Raise awareness and a sense of responsibility on the part of the fellowship for the need to adequately fund the cost of NAWS services.

Objective 14: Build and align the focus of staff with the capacity to support identified priorities.

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Key Result Areas, Objectives, and Approaches ●

Initial priorities to be addressed   Priority but considered "routine"

Second ranking   Third ranking

SERVICE OBJECTIVES

Key Result Area: Communication

"Narcotics Anonymous has universal recognition and respect as a viable program of recovery."

From NAWS Vision Statement

Internal Communication

Clear, consistent, and *relevant* communication throughout the service structure is essential. In order to fully engage and unify the fellowship around our vision and to effectively address NA members' issues of concern, we must improve our communications. World services must better understand and focus on the different needs and priorities of our various service bodies and NA communities. We must also maximize opportunities for dialogue. We need to make information more accessible and provide it in the most useful format for the members we are trying to reach.

Current Activity

Our communications efforts include face-to-face dialogue, written reports, and website development. This conference cycle we conducted five worldwide workshops and held two world conventions. At these events we hosted workshops on a variety of topics for members interested in service to help raise member awareness as to what NA World Services does on a regular basis and get input on current projects. We continue to work on ways to improve the worldwide workshops. We also currently attend most zonal forum meetings annually, as well as multi-regional events and other workshops throughout the fellowship. We have worked with some local H&I and PI committees in attending non-NA/professional events. Another primary way we communicate is through our periodicals. We currently publish *The NA Way Magazine, NAWS News,* the *Conference Report,* the *Conference Agenda Report,* the *Annual Report, Reaching Out,* and *Meeting by Mail,* all intended to speak to those we serve. Many of our periodicals, such as *The NA Way Magazine,* are available online at www.na.org. We also regularly update our website with reports and information about world service events and continue to introduce innovative convention registration technology. We are aware, however, that many of our members do not have access to computers, and we modified the convention flyer to make it more easily duplicated and distributed. We also recently added a special section to www.na.org for conference participants. What we would like to add to this list to improve communications in the 2004--2006 conference cycle is described in approaches 1.1 through 2.3 below.

Objective 1: Develop and disseminate information of high value to intended NA communities and/or service bodies.

Approaches for improvement in 2004–2006

1.1   Evaluate how World Services receives input from, reports to, and gets feedback from the fellowship to assist in all stages of the work process.
NAWS Communications & Publications Project Plan
Fellowship Issue Discussions Project Plan

Objective 2: Improve the effectiveness and efficiency of world services' communication with the fellowship.

Approaches for improvement in 2004–2006

2.1 Evaluate all NAWS publications for content, approach, and audience and submit recommendations.
NAWS Communications & Publications Project Plan

2.2 Evaluate the NAWS website for content, functions, and ease of use and redesign the site accordingly.
Ongoing or routine service of NAWS, no project plan is needed.

2.3 Improve accessibility of existing NAWS publications to the fellowship by instituting e-subscriptions for *NAWS News* and *The NA Way*.
Ongoing or routine service of NAWS, no project plan is needed.

External Communication

Trends in acceptance, visibility, and treatment of addiction will continue to significantly affect the growth of the fellowship. Given this influence on our membership, NA World Services needs to educate and have a strong presence in all sectors of the public to better support the fellowship. Building upon a positive perception of Narcotics Anonymous, we must increase public relations efforts, build strong relationships with groups outside of NA, and stand as the voice of the fellowship.

Current Activity

Our public relations efforts have included attending professional events, surveying our membership, and gathering information about the perception of NA. This last conference cycle we created and held a total of four public relations roundtables. The roundtables are an opportunity for us to solicit invaluable input and feedback from professionals in the correctional, medical, and treatment professions. In addition, we continue to survey the fellowship at world conventions and update this information in *NA: A Resource in Your Community* and *Information about NA.* Beyond these two pieces, we created a new visual pamphlet entitled *2002 Membership Survey.* These pamphlets have served as an accurate representation of our fellowship to professionals and non-addict communities and organizations. We have successfully communicated with other twelve-step fellowships (AA, OA, and Alanon) and occasionally cooperate with some government-sponsored community-based activities and organizations to help introduce NA in communities where nothing currently exists and to become available as a community resource. In this spirit, the most predominant task we do regularly is that we continue to attend events focused at those professionals who deal with the treatment of and/or the institutionalization of addicts. Whenever possible, we use volunteers from the local NA community to assist world services at these events. This helps members to see how world services interacts with professionals and serves to further inform those members about public information and public relations. Attending these events involves extensive preparation by NAWS staff members who diligently work at updating and preparing materials, shipping those materials to event venues, setting up booths at events, and interacting with the professional communities to make sure that Narcotics Anonymous is presented in a way that truly reflects the strength and passion of our fellowship. All of these efforts help us to routinely communicate with those outside of NA. There are specific areas that we would like to add to this list to improve communications for the 2004–2006 conference cycle. These items are described in approaches 3.1 through 3.3 on the next page.

Objective 3: Raise awareness and enhance the perception of Narcotics Anonymous as a credible program of recovery.

Approaches for improvement in 2004–2006

3.1   Create a public relations strategy.
Public Relations Strategy Project Plan

3.2   Develop a set of PR tools for the fellowship to use in local efforts.
Public Relations Strategy Project Plan
Service Handbook Project Plan

3.3   Gather a broader range of input and perspectives to assess perceptions of NA. Develop methodologies to collect this information throughout the fellowship.
Public Relations Strategy Project Plan

Key Result Area: Fellowship Support

> *"NA communities worldwide and NA world services work together in a spirit of unity and cooperation..."*

<div align="right">From NAWS Vision Statement</div>

Service Structure

A strong service structure operating at a consistently high level of performance is critical in providing wide access to NA and in building awareness of NA as a viable program for recovery. We must find ways to better support the operation of the service structure and increase the understanding of how components of the structure complement each other in achieving a common goal. Support must be tailored to the different needs and stages of development of NA communities around the world.

Current Activity

A great deal of our effort is spent in fellowship support—acting as a clearinghouse for service materials as well as a resource and experience base for NA communities worldwide. We routinely provide general support to the fellowship through individual written communications when requested and direct conversations via the telephone or in person at events. Part of our support to the service structure is simply sending members sample area subcommittee guidelines. We solicit and maintain examples of various group and service committee experiences and tools so that we can distribute these resources to members seeking guidance in their service efforts. In addition, we sometimes introduce groups and committees to already existing tools. We currently serve as a resource for new groups by sending out group-starter kits and assist regional and area offices and boards in forming, signing contracts, and avoiding some of the pitfalls we have found through our "hard won experience," by referring them to service material and literature. Another crucial aspect of our support is answering questions from members and committees regarding problems/issues that arise: everything from how groups have dealt with theft of funds to fundraising issues or dealing with an institution's rules. What we would like to add to this list to improve support to the service structure in the 2004–2006 conference cycle is described in approaches 4.1 and 4.2 on the next page.

Objective 4: Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.

Approaches for improvement in 2004–2006

4.1 Define the role and importance of each level of the service structure as it relates to accomplishing NA's overall vision, primary purpose, and goals.
Service Structure Relationship & Definition Project Plan

4.2 Improve the existing set of tools (manuals, training/orientation at various forums, facilitation of exchanges between leaders, technology tools, etc.) and support strategies and develop new tools to strengthen the service structure and impart core principles and philosophies.
Service Material Project Plan
Service Handbook Project Plan
Consensus-Based Decision-Making Project Plan

Objective 5: Work to sustain and build all NA communities, recognizing their different levels of development.

Approaches for improvement in 2004–2006

5.1 Develop tools and plans to address developmental needs of NA communities. Incorporate the broad range of needs of a global fellowship into new and revised service material and handbooks.
Service Material Project Plan
Service Handbook Project Plan

5.2 Use the template created for regional reports to WSC 2004 as a template to capture current information on NA communities on an annual basis. After this is tried and discussed at WSC 2004, evaluate the instrument and begin to gather information routinely.
Ongoing or routine service of NAWS, no project plan is needed.

Community Development

NA's increasing diversity—geographically, culturally, by age, and in other significant ways—creates new challenges in attracting and continuing to engage members and potential members. In addition, the needs of newcomers to the program can differ significantly from those with greater experience. We must find ways to identify and address the issues that arise from growth and diversity, and which potentially serve as barriers to the recovery possible through NA.

Current Activity
Our literature is an excellent tool for addressing diversity. (Objective Six discusses this in more detail.) The *Sponsorship* book, that is out for approval now, incorporates experiences from a large cross-section of NA members. In addition, we have used articles in *The NA Way Magazine* as a valuable tool for reaching diverse segments of our membership. We are also increasingly becoming more inclusive of and acknowledging our diversity through world convention and worldwide workshop topics and discussions. What we would like to add to this list to improve support to community development in the 2004–2006 conference cycle is described in approach 6.1 on the next page.

Objective 6: Broaden availability of the Narcotics Anonymous message to a widely diverse membership and potential membership.

Approach for improvement in 2004–2006

6.1 Frame issues related to the Third Tradition and the actual availability of our message regardless of age, race, creed, sexual identity, religion, etc. Develop targeted tools about these issues for different audiences and events from home group meetings to worldwide workshops and initiate a dialogue.
Service Material Project Plan

Key Result Area: Recovery Literature

"Every addict in the world has the chance to experience our message in his or her own language and culture..."

From NAWS Vision Statement

Literature Content

As the NA Fellowship grows and diversifies, the need and expectation for a greater range of recovery literature increases. NAWS has already had success in meeting members' language needs via the translations process. However, the specific cultural needs of members must be understood more clearly, and a number of issues must be resolved to satisfy these needs. These issues include the degree to which the fellowship is willing to address cultural barriers in the content of literature.

Current Activity

We continue to try to reach more members through translations efforts and the creation and revision of literature. There are currently sixty-three active literature translation projects and another 237 pending projects in a total of forty-two different languages being worked on. Our work with and encouragement of local translation committees in the translation of this literature is ongoing. Much of world services' recovery literature work is focused on this assistance and production of translations of NA-approved literature, as well as ensuring that literature is available. As stated in the *2003 Annual Report*, "The bottom line in translations is that it is never a question of wondering what to do but, rather, how can we manage to do more when there is just so much work waiting to be done?" Another large project for us during this cycle was the *Sponsorship* book, which is out for approval now. This book was written with sensitivity to the growing needs and diversity of the fellowship. Our Basic Text is now published in thirteen different languages, and we are also proposing a motion to create a Sixth Edition that will hopefully encapsulate some of the diversity of our fellowship, as it exists today. What we would like to add to this list to improve the content of recovery literature in the 2004–2006 conference cycle is described in approaches 7.1 and 7.2 below.

Objective 7: Build a range of literature to meet the diverse needs of members and potential members.

Approaches for improvement in 2004–2006

7.1 Develop personal stories for the English-language Basic Text that address the diversity of current NA membership and experience.
Basic Text Project Plan

7.2 Create articles, bulletins, or information pamphlets that address the needs of specific populations in NA.
Targeted Literature Project Plan

Literature Process

NA literature and related products are perhaps the most tangible and recognizable component in how our message is carried. As a result, improving the effectiveness and efficiency of the systems by which this material is prioritized, developed, distributed, and maintained can have a direct, positive impact on NA as a whole.

Current Activity

NA's literature process has been a living process, responsive to each project. The development, review, and input processes have varied for each of the past several literature projects. Each project plan for literature has outlined specifically the individual needs of that project as well as how the review and input process for that project would operate. Our most ambitious literature project since the restructuring of NA World Services has been the *Sponsorship* book. We received written input from members around the world and held sessions at worldwide workshops and world conventions to hear first-hand from our members what they were looking for in this new book. Through the use of a workgroup comprised of World Board and world pool members, we reviewed the input and used the words of our members to create a truly diverse book that will hopefully reflect the shared experiences of our members around the world. Our hope is that this new book will inspire new members, those who have been in recovery longer, and those yet to experience our fellowship. Throughout the creation of this text, we evaluated our process. We would like to see what occurs with the Basic Text and Targeted Literature projects before we begin discussing possible revisions to our literature processes. Such discussions will need to include how we translate that literature and how it is distributed and maintained. While we do have recent experience in evaluating our literature process, we are not yet ready to proceed with any concrete conclusions.

Objective 8: Streamline and increase responsiveness of the literature development process to meet the needs of the fellowship.

ORGANIZATIONAL OBJECTIVES

Key Result Area: Leadership and Management

"Honesty, trust, and goodwill are the foundation of these ideals."

From NAWS Vision Statement

Leadership Development

It is increasingly apparent that, in order to progress consistently toward the fulfillment of NAWS's vision and goals, ongoing development of qualified, informed, and engaged leaders at all levels of the service structure is critical. Any progress toward the completion of our objectives in this area will depend on a clear understanding of leadership roles and requirements within our structure. We must take a holistic look at our current strategies for leadership development and develop better ways to identify and cultivate the skills of our leaders. This cultivation should include expanding the involvement of member-volunteers.

Current Activity

Though our attention has increasingly turned to leadership development issues, our current opportunities are largely informal. The only real process in place at present is our ability to monitor the development of members who are selected to participate in a World Board workgroup or are otherwise used as a pool resource. We have used World Pool members in many different capacities, from currently serving on *The NA Way Magazine* and *Reaching Out* editorial boards, for example, to one-time volunteer opportunities at the world convention. This

serves as a great way for seasoned members to train new members as well as for less experienced members to get exposure to world services. World conventions and worldwide workshops also provide an opportunity to local members who might never otherwise participate at a world level of service and work closely with NAWS trusted servants and staff. Through these activities we hope to also contribute to the local community leadership, sharing with members some of our experiences and demonstrating through example our current practices in service meetings. Additionally, an informal process of potential leader identification occurs during interactions between NAWS and the fellowship at the World Service Conference and other events that we attend. However, formal systems are not in place for identification at such events. While we have not initiated conversations about leadership, there is useful information contained within the Concept Four essay. What we would like to add to this list to improve leadership development in the 2004–2006 conference cycle is described in approaches 9.1 through 9.3 below.

Objective 9: Effectively identify, cultivate, encourage, and support committed, qualified leaders for all levels of the service structure within the fellowship as a whole.

Approaches for improvement in 2004–2006

9.1 Define leadership qualities in NA that speak to members, groups, areas, regions, and world services. Concept Four will be used as the foundation. This will also consider the personal and cultural differences in the practice of leadership in NA.
Leadership Qualities in NA Project Plan

9.2 Evaluate current strategies NAWS uses to identify and cultivate leaders. Evaluate the current World Pool, nominations, and Human Resource Panel systems.
Leadership Identification & Development Project Plan

9.3 Establish a NAWS leadership identification and development system. An integral part of this system will include the involvement of delegates and improved use of and ability to identify and access the expertise of the fellowship.
Leadership Identification & Development Project Plan

Structure
Over the past several years, NA World Services has adjusted its structure to build a more efficient, responsive, and flexible organization. A core component of that structure is the oversight work performed by the World Board and interaction with regional delegates. We must continue to improve our structure to strengthen the relationship between world services and the fellowship and to better accomplish our goals and fulfill our priorities.

Current Activity
As we continue to evolve and adjust while we move forward, we have accepted the fact that having mandated standing committees is not as effective as a more flexible structure for a strategic board. We are reaching out to the fellowship and asking for help by allowing us to remove such a mandate and become a more workgroup-supported board. This is reflected in a motion in this year's *CAR*. This more flexible structure will give us opportunities to utilize more World Pool members and thus continue to work on other goals such as leadership development. We believe that the work for this conference cycle should focus on process and content and so are not recommending any approaches for improvement for this objective for the 2004–2006 cycle.

Objective 10: Refine NAWS structure to ensure it provides the foundation needed to carry out NAWS leadership and management roles and responsibilities at a high level of performance.

Operating Processes

As a member-driven organization, we have worked hard to understand and meet the needs of the fellowship through excellence in customer service and ever-increasing productivity. Without effective systems to manage and prioritize the work, however, quality and follow-through can suffer. We must continue to implement a strategic management model, step by step. Within such a model, the NAWS Strategic Plan focuses the efforts of leadership and staff. Systems are also in place to gather the input and information needed to make informed decisions, prioritize issues, organize the resulting workload, and measure progress and results.

Current Activity

As we have reported throughout the last cycle, we are making strides toward becoming more plan-driven and strategic. We have spent time in every board meeting focusing on improving NAWS planning and organizational processes. We will continue to develop and refine these processes over the upcoming conference cycle. What we would like to add to this list to improve our operating processes in the 2004–2006 conference cycle is described in approaches 11.1 through 11.3 below.

Objective 11: Continue to build the systems, tools, and operating culture necessary to support strategic management of NAWS.

Approaches for improvement in 2004–2006

11.1 Consistently advance the value of a *plan-driven* organization in communications and interaction with the fellowship.
NAWS Communications & Publications Project Plan

11.2 Take the next steps in strategic management process and tool development.
Ongoing or routine service of NAWS, no project plan is needed.

11.3 Identify, plan, and implement training and orientation needs of the World Board, workgroups, and staff for the coming planning cycle. With the turn over in the World Board and the number of projects planned, this will have a large focus on orientation.
Ongoing or routine service of NAWS, no project plan is needed.

Key Result Area: Resources

> "…our vision is our touchstone, our reference point,
> inspiring all that we do."

From NAWS Vision Statement

Financial Resources

Growth of the worldwide fellowship and ongoing member expectations for services place demands on our resources. To ensure that we build and maintain adequate resources that grow with the fellowship, we must take a fresh look at funding sources and the flow and use of world service resources. We must also find ways to raise fellowship awareness of the resources NAWS has and how they are used.

Current Activity

Our efforts to become more financially responsible and responsive to our members' needs are ongoing. While the Business Plan Group continues to talk about the long-term financial viability of NAWS, Inc., we have been successful at creating an operating reserve that is currently at 84.3 days. Our goal, as approved by the conference, is to establish a ninety-day operating reserve, and we are working diligently to that end. In our daily operations as our fellowship's main service center, our current focus has been to be timelier in both our literature fulfillment efforts and our financial reporting. We have improved software in both areas. As a result, the literature fulfillment for 2002–03 was forty-four orders per working day. Our accounting software lets us consolidate reporting for the United States, Belgium, and Canada locations in real time. We continue to look into ways to accept orders online and have taken steps to produce currency-equivalent information on our invoices and other documents to assist our members in Canada and Europe. What we would like to add to this list to improve our financial resources in the 2004–2006 conference cycle is described in approaches 12.1 through 13.2 below.

Objective 12: Ensure the long-term reliability of the NAWS income stream in order to carry out identified priorities and service.

Approaches for improvement in 2004-2006

12.1 Implement member contribution portal and online shopping cart.
Ongoing or routine service of NAWS, no project plan is needed.

12.2 Re-evaluate the current financial reserve limits and policies.
Business Plan Workgroup Project Plan

12.3 Continue marketing to correction and treatment with an increase on measuring the results of those efforts.
Ongoing or routine service of NAWS, no project plan is needed.

12.4 Pursue the strategy of printing alternative formats in those communities where literature is currently provided at little to no cost.
Ongoing or routine service of NAWS, no project plan is needed.

12.5 Hold the five percent price increase scheduled for January 2003 in abeyance. Review all projected costs and shipping for 2003 and make recommendations.
Business Plan Workgroup Project Plan

12.6 Revise financial management policies to better meet the needs of the organization.
Business Plan Workgroup Project Plan
Literature Distribution and Convention Workshop Project Plan

Objective 13: Raise awareness and a sense of responsibility on the part of the fellowship for the need to adequately fund the cost of NAWS services.

Approaches for improvement in 2004–2006

13.1 Frame a discussion and develop messages that focus on donations paying for services.
Business Plan Workgroup Project Plan

13.2 Create a new IP that reflects current contribution practices in NA and encourages our members to see self-support as having intrinsic value.
Self-Support IP Project Plan

Staff Capacity

WSO staff must provide expertise and experience in developing and managing the projects, products, and services needed to fulfill the directives of the World Board, and staff members must be full partners in realizing the NAWS vision. To succeed, gaps in staff expertise must be identified and filled (or outside resources used), and existing staff must work as productively as possible. Our staff capacity must be routinely reviewed against and aligned with NAWS goals and priorities.

Current Activity

In the last conference cycle we have made strides and confronted challenges to improve staff capacity. NA World Services, Inc., currently employs fifty-one people, including our branch offices in Belgium and Canada. There has been some recent turnover in staff, and we are working to train and orient new employees who have filled open positions. In addition, we have promoted some staff members from within the WSO, which has left vacancies in their old positions. With project coordinator and assistant positions still open, our human resources department continues to accept and review applications and conduct interviews. We include information about available employment opportunities in our fellowship's publications and also post some opportunities on our website at www.na.org. What we would like to add to this list to improve our staff capacity in the 2004–2006 conference cycle is described in approaches 14.1 and 14.2 below.

Objective 14: Build and align the focus of staff in order to support identified priorities.

Approaches for improvement in 2004–2006

14.1 Recruit competent staff to fill open positions.
Ongoing or routine service of NAWS, no project plan is needed.

14.2 Create training and orientation modules for staff.
Ongoing or routine service of NAWS, no project plan is needed.

◆
NAWS Work Process

The following diagram represents the stages of a typical NA World Services planning cycle. Using the Strategic Plan as a guide, project plans are developed for the cycle. Projects are prioritized, and work is then delegated to staff and/or workgroups. The board monitors the work and uses that information along with any information about NA and the "environment" (e.g., world events, demographic trends, etc.) to evaluate for the next planning cycle. Throughout the cycle, world services receives input from, reports to, and gets feedback from the fellowship to assist in all stages of the work process.
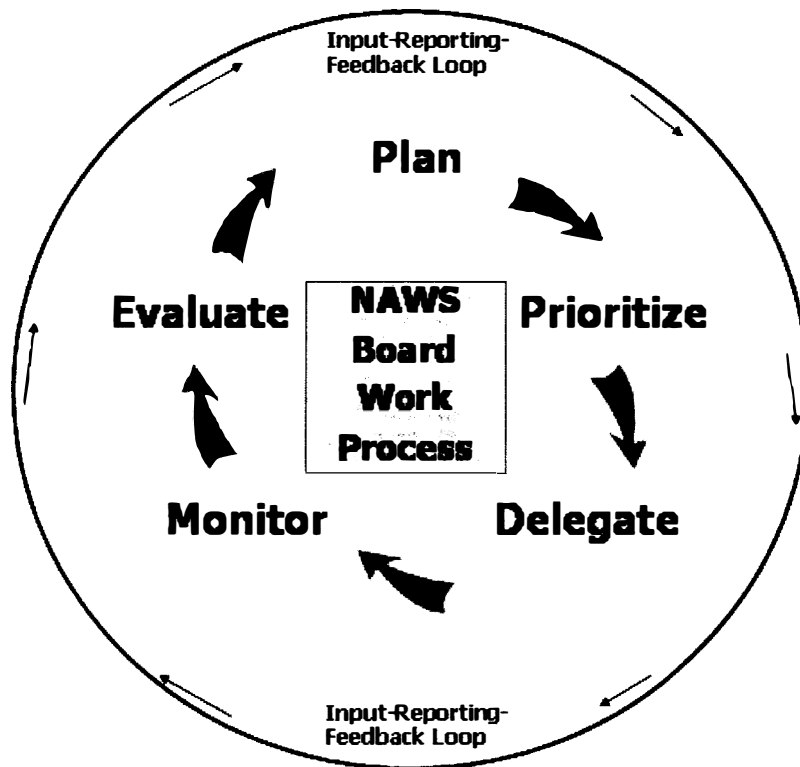
NAWS PLANNING PROCESS

Prioritizing Steps within the NAWS Plan Development and Implementation Process

Input to Plan Received	→	Strategic Plan Validated/Adjusted	→	Objectives Defined and Prioritized

	Objectives Defined and Prioritized

Input to Plan Received → Strategic Plan Validated/Adjusted → Objectives Defined and Prioritized ↓

Evaluate Activity against Prioritized Approaches ← Review Existing NAWS Activity and Brainstorm New Activity ← Approaches Defined and Prioritized

Prioritize Activities (Existing and New) → Conduct Resource Assessment → Refine Priorities

Develop Committee/ Workgroup Charges ← Develop Committee/ Workgroup Structure ← Project Plans Approved at WSC

Implement Monitoring and Measurement System → Adjust Priorities as Needed during Cycle

Overview

There are a couple of changes to the format of the budget draft for 2004–2006. These changes reflect the current standards for nonprofit financial statements. The draft shows Operating Income (Gross Sales minus Cost of Goods) before the four expense areas (Literature Production & Distribution, World Service Conference Support, Fellowship Development, and Events). Also, we have placed the specific income and expense projections for the World Convention at the end of the budget.

The proposed budget included in this packet covers all proposed world services activity from 1 July 2004 through 30 June 2006. This financial plan has been created with what we believe to be conservative estimates for both income and expense. It is still true that throughout the implementation of a unified world service system, we have been working on better systems to capture the information needed to support the budget you approve, and ways to make the reporting of that information more easily understood.

The *Guidelines for the Budget for NA World Services* calls for three classifications of expense:

- **Fixed Operational Funds**—funds allocated toward world service activities that are recurring in nature and have little to no functional change from budget year to budget year.

- **Variable Operational Funds**—funds allocated toward non-routine world service projects and/or activities that vary from budget year to budget year. This includes those items prioritized by the World Service Conference.

- **Reserve Funds**—allocations that are set aside to meet current and/or future financial needs. These funds are maintained in both short-term and long-term reserve accounts. Funds are also allocated toward the planned use of cash to offset, the effect of depreciation, improving asset value, providing financial resources necessary to effectively address the intellectual property management called for in the FIPT, and/or to acquire any fixed asset that has a depreciable value.

Fixed and variable expenses are identified in the proposed 2004-2006 budget. The proposed project plans included in this document cover the proposed variable operational expenses. Reserve funds are reflected in Cash Basis, which is shown at the end of the proposed budget. We have also provided a brief explanation of some of the kinds of items contained in each line item of this budget. These are identified as Fixed Operations (called Routine or Basic Services in the past).

The first column of this budget shows actual expenses for the fiscal year ending 30 June 2003. These figures are used as the basis for this entire budget. Column two covers year one of this budget, fiscal year 1 July 2004 through 30 June 2005; column three covers year two, fiscal year 1 July 2005 through 30 June 2006; and column four shows the total expense for the cycle, 1 July 2004 through 30 June 2006.

2004-2006 World Services Projected Income

The income projections for this budget are based upon the actual income figures from the 2002–2003 fiscal year. This is what is referred to throughout this document as "prior year's income."

Recovery Literature—Year one is projected to show a 1% increase over the prior year. Year two income is projected with no increase over year one. We have not included any projection for income or expense from the *Sponsorship* book since this is pending conference action.

Other Inventory—We have projected the same overall increase as reported above for recovery literature.

Shipping—This income is based on projected literature sales and a portion of the expected expense increase. Year one anticipates an increase of 1.55% and year two's projected increase is 2.75% above that figure. The Business Plan Workgroup is reviewing our current shipping charges and changes may be made based on their recommendations.

Discounts—This is based on projected literature sales and the current level of discounts.

Developmental Subsidies & Allowances—This is the expense of subsidizing or reducing the cost of literature provided to a growing worldwide fellowship. We have projected the same overall increase as reported above for recovery literature. Presently, to see the full value of this provision you have to add this amount to the line in the expense portion of the budget under Fellowship Development called "Developmental Literature."

Recovery Literature Expense—This section covers the cost of goods for recovery literature under the Fellowship Intellectual Property Trust.

Other Recovery Literature—This is the cost of goods for all FIPT literature other than books, primarily IPs.

Other Inventory Expense—This section covers the cost of goods for all other items related to the production and distribution.

Fellowship Donations—Donations seem to flatten or decrease in any year with a conference. This is primarily due to a decrease in regional donations. Year one projects a decrease in donations from 2002-2003, and year two is approximately 5% higher than year one. We are projecting that, during this next conference cycle, contributions will have increased by a total of 5%, with the *exception* of regional donations.

Unity Day income will be included in fellowship donations from now on. There will not be Unity Day income for 2004 since we are proposing that Unity Day be a time for the fellowship to have a moment of silence together and that there be no World Services sponsored Unity Day meeting and celebration until 2005 at WCNA-31. We are asking to try this for one cycle and will come back to WSC 2006 to determine if this is a practice that will continue.

Licensed Vendor Payments—This income is based on prior experience.

Interest—This income is expected to increase 1% for year one and increase an additional 0.5% for year two. The raise is due to expected rate increases and more readily available funds than in this past cycle with two conventions.

Event Specific Income—In an effort to keep the direct income and expense effect of a World Convention easy to see, we have placed the WCNA-31 convention budget at the end of the overall budget. Please remember that this is a working budget only, since many of the specifics about this event have not been finalized.

2004–2006 World Services Fixed Operations

The term "Fixed Operational Expenses" refers to the activities of world services that are ongoing and recurring in nature, and that do not change dramatically from year to year as a result of conference actions. All of these activities require planning, support, and follow-up from world services staff.

The budget is broken into four major expense categories that represent the following percentage of our overall activity:

- **Literature Production & Distribution**
- **World Service Conference Support**
- **Fellowship Development**
- **Events**

Under each of these categories there is an attribution for accounting, personnel, overhead, and technology. The overall expense for these items is divided between the four categories by their percent of activity. For this cycle, we are attributing 35% to Literature Production & Distribution, 26% to World Service Conference Support, 31% to Fellowship Development, and 8% to Events. The increase of the percentage allocated to Fellowship Development (from 23% to 31%) and decrease in World Service Conference Support (from 27% to 26%) is a result of where we placed the proposed projects in the budget. The change in Events (from 16% to 8%) is due to the decreased level of activity expected with only one world convention in this budget cycle.

The following is a list of the types of expenses that are included in each attribution (reflected in the budget in purple), followed by a simple breakdown of the fixed operations expenses under each budget category. All increases or decreases are referred to against the actual expenses incurred in the 2002-2003 fiscal year.

Accounting—This contains bank service charges, professional services for annual audits and random forensic spot checks and other professional services associated with financial management, and contract labor. Bank service charges have grown as credit card sales have increased. To cover these services we have projected a 2% increase for year one and a 5% increase for year two.

Personnel—This contains all wages and salaries, payroll taxes, health and workers compensation insurance, training, recruitment, relocation, and retirement plan expenses associated with employees at all three branches of the World Service Office. It also includes contract labor hired for specific purposes. Year one reflects a 2% increase, and year two reflects an additional 3% increase.

Overhead—This is the facility lease expense, maintenance and repair, telephone, utilities, postage, auto service and lease, office expense, general insurance, amortization, bad debts, depreciation, and dues and fees associated with the three branches of the World Service Office. This expense is expected to increase by approximately $100,000 for year one to accommodate the need for additional warehouse space and increase 5% for year two.

Technology—This is the expense for information services, computer leases, software, supplies, equipment lease and repair, and service contracts for the three branches of the World Service Office. Expenses associated with maintaining the na.org website are attributed here. The expense associated with the database, online group registration and meeting information, and event registration is also included here. This expense is also expected to remain the same for year one and increase 5% for year two.

LITERATURE PRODUCTION & DISTRIBUTION

This section of the budget covers the expenses associated with the distribution of NA literature to fellowship and non-fellowship customers. This currently occurs through the WSO in Chatsworth and its branches in Canada and Belgium. For this budget cycle, we have projected increases in those costs for which we have received notice. This includes increases from the major book publishers, bindery services, booklet printers, and other printing suppliers of approximately 1% for year one and 2.5% for year two.

Fixed Operational Expense—All literature production and distribution costs that are not included under Total Cost of Goods Sold. These expenses are projected to increase 1% for year one and 2.5% for year two.

> **Marketing**—This covers the expense for attendance at and participation in professional events primarily related to corrections and treatment. Although we call this marketing, it is public relations focused activity. These efforts are primarily conducted by staff with local volunteers. This includes the registration and preparation for events, travel, and follow-up for this activity. We have increased the number and types of events that we attend.

> **Translations**—This covers the direct expense for translations of recovery and service material into languages other than English.

> **In-House Production**—This includes the lease for reproduction equipment to print booklets and IPs that are not outsourced—primarily non-English IPs and booklets, service materials, publications other than *The NA Way*, and reports. We plan to bring more of this activity in-house for this next cycle. This will give us greater flexibility and control of those items that we produce in small quantity.

> **Shipping**—This expense is based on projected income and anticipated rate increases from our major carriers.

> **Legal**—This is primarily the direct registration and legal expense associated with obtaining and maintaining worldwide copyright and trademark registrations for Narcotics Anonymous, *The NA Way,* the NA Logo, the Group Logo, and the Service Symbol, as well as all recovery and service material.

> **Travel**—This is travel required to support and manage two branch offices in Canada and Belgium or other travel directly associated with the production or distribution of our literature.

WORLD SERVICE CONFERENCE SUPPORT

Fixed Operational Expense—This section of the budget covers the expenses associated with support to all World Service Conference-related activities.

> **Publications**—These are the expenses associated with the production of the *Annual Report,* the *Conference Report* twice each year, the *Conference Agenda Report* once each conference cycle, *Quarterly Financial Reports*, and *NAWS News* four or more times per year. The expense for translating *NAWS News* and the *CAR* is also included here. We have projected an overall 2% increase for year one and a 5% increase for year two in this category.

> **World Service Conference**—These are the expenses for the location and equipment needed for the event, the parliamentarian, and funding for staff, World Board, WSC Cofacilitators, and the Human Resource Panel. Currently, the travel expense for 102 delegates from around the world is listed as a separate line item.

> **World Board**—The following numbers are an estimate at this time. The World Board will meet a minimum of eight times in this conference cycle, plus the conference itself. An orientation for new board members is included as a separate meeting at the beginning of the conference cycle. Additionally, in each conference cycle, training needs for the full board are included. The EC is budgeted to meet a minimum of five times in this conference cycle. The figures reflect a 2% increase in year one and in year two a 5% increase to cover expected cost increases.

> **Human Resource Panel**—This group is scheduled to meet a minimum of five times during the 2004–2006 cycle to work on nominations and manage the World Pool. A part of one of these meetings is also used for orientation and training. These expenses are projected to increase, as reported above for the World Board.

> **WSC Cofacilitator**—The WSC Cofacilitators are scheduled to meet twice this year, once with the parliamentarian and once with the World Board and the HRP. We expect similar activity for this next cycle.

> **Travel**—This is the activity of world services face-to-face interaction with the fellowship for *Conference Agenda Report* workshops. This includes the selection of events and travelers, and the preparation and communication required.

FELLOWSHIP DEVELOPMENT

Fixed Operational Expense—This section of the budget covers the expenses associated with support to the fellowship. We have projected an increase of 2% for year one and 5% for year two.

> **Publications**—*Reaching Out* four times per year, *Meeting by Mail* six times per year, and *The NA Way Magazine* four times per year in five languages to over 27,000 addresses. Our expenses have increased for this fiscal year, and we expect them to continue to increase.

Fellowship Support—This is world services' face-to-face interaction with the fellowship, primarily in workshops and forums. This can also be assistance provided to zones, primarily for participants' attendance at their forums. This has also included assistance with local fellowship development activities.

Professional Events—This is the expense for attendance at and participation in professional events that in some way address addiction and/or addicts. Some of these events have been the International Council on Alcohol and Addictions (ICAA), the World Federation of Therapeutic Communities (WFTC), the annual meeting of the American Society of Addiction Medicine (ASAM), the SouthEast Conference on Alcoholism and Drug Addiction (SECAAD), the National Association of Alcohol and Drug Addiction Counselors (NAADC), and some minor activity with the United Nations. These activities often overlap and complement our marketing activity.

Developmental Literature—This is the cost to distribute free literature to a growing number of developing NA communities, hospitals and institutions, or literature distributed for public relations purposes. We are still working on better reflecting this activity in our financial reports. Presently, to see the full value of this provision you have to add this amount to the line in the Income portion of the budget called "Developmental Subsidies & Allowances."

EVENTS

Fixed Operational Expense—This section of the budget covers the fixed expenses associated with event planning and support to the fellowship.

Unity Day—For this conference cycle, we are proposing that in 2004–2005 Unity Day be a fellowship-wide celebration without a specific event hosted by World Services. In 2005–2006, Unity Day will be held at the world convention in Hawaii. As a result, there is no allocation for Unity Day in the first year of the cycle.

WCNA-31—The income and expense figures here are an estimate only. It is projected to have approximately 5,000 people registered.

2004–2006 World Services Variable Operations

The *Guidelines for the Unified Budget for NA World Services* calls for a specific process to be created for the consideration, evaluation, development, and approval of world service projects and those activities that vary from year to year. Each project is included in the draft budget under the appropriate budget category and then under variable operational funds.

These project plans return to the practice of reflecting direct expenses rather than attempting to capture staff expenses as well. In the past, we have gone to great effort to estimate the time expected for each type of employee to complete each project and track this during the cycle. Since this is not something that was tracked in our financial reporting during the last cycle or discussed at the conference, we have not included it in the plans for this cycle.

We may or may not be able to accomplish everything that we propose. We believe that the spirit of the budget process adopted by the conference requires conference approval of the work of world services. Therefore, we are presenting all

Budget Description

items that could possibly be worked on before the next meeting of the WSC. We will report our activity throughout the conference cycle.

We were presented with a dilemma when putting together the proposed budget for this upcoming conference cycle. As we said, we are proposing more projects than we may be able to accomplish; while this is often true in terms of limited human resources, this cycle, our financial limitations created a challenge as well. That is, we are proposing more projects than we have projected income to cover. For that reason, the expenses of the projects are reflected in contingent columns and are not included in the budget totals. Once projects are discussed and approved by the conference, a revised budget will be created that includes these projects in the budget totals.

We have used historical estimates, with estimated increases during the next two years, for travel expenses, conference calls, and mailings. These plans, as with the rest of the budget, have used generous estimates to try to ensure that we stay within budget. For proposed project plans that have a range for the number of meetings, we budgeted for the maximum number indicated.

In the December 2003 *Conference Report*, we reported on all projects approved for the 2002–2004 cycle: which were completed, which we made progress on, as well as those for which little to no work was done.

For the 2004–2006 conference cycle, we have created the following plans as a direct result of our strategic plan. We discussed what activities would help us to achieve the objectives under each key result area. Those discussions resulted in our identifying the approaches for improvements that we believe are possible. We then discussed *how* to achieve the approaches that we had identified, which resulted in the following project plans. Each project plan begins with the relevant objective(s) and approach(es) from our strategic plan to illustrate the connections between the strategic plan and the projects.

The color-coding below corresponds to the strategic plan.

Priority but considered "routine"

Initial priorities to be addressed

Second ranking

Third ranking

The project plans proposed for 2004–2006 are:

Business Plan Workgroup

Basic Text

Leadership Identification & Development

NAWS Communications & Publications

Public Relations Strategy

Service Handbooks

Service Material

Leadership Qualities in NA

Self-Support IP

Service Structure Relationship & Definition

Targeted Literature

Capturing Long Time Members' Experience

Consensus-Based Decision-Making at the WSC

Fellowship Issue Discussions

Literature Distribution & Convention Workshop

Worldwide Workshops

Business Plan Workgroup

Objective 12: Ensure the long-term reliability of the NAWS income stream in order to carry out identified priorities and service.

Approach 12.2—Re-evaluate the current financial reserve limits and policies.

Approach 12.5—Hold the five percent price increase scheduled for January 2003 in abeyance. Review all projected costs and shipping for 2003 and make recommendations.

Approach 12.6—Revise financial management policies to better meet the needs of the organization.

Objective 13: Raise awareness and a sense of responsibility on the part of the fellowship for the need to adequately fund the cost of NAWS services.

Approach 13.1—Frame a discussion and develop messages that focus on donations paying for services.

Purpose and scope of the project:

This workgroup has been created as a resource to both the Executive Committee and the World Board. Focused on the business portion of NAWS operations, the Business Plan Workgroup evaluates our operations and financial reporting on a regular basis and makes recommendations to ensure that we build and maintain adequate resources that grow with the fellowship. Some of the specific focuses for the 2004–2006 conference cycle are:

- Implement member contribution portal and online shopping cart.
- Re-evaluate the current financial reserve limits and policies.
- Continue marketing to correction and treatment with an increase on measuring the results of those efforts.
- Pursue the strategy of printing alternative formats in those communities where literature is currently provided at little to no cost.
- Review all projected costs for literature and shipping, and make recommendations for the future. A price increase of 5% scheduled for January 2004 was set aside pending the results of this review.
- Revise financial management policies and tools to better meet the needs of the organization.
- Develop and frame messages that focus on donations paying for services.

Direct expense items:

4 Meetings for 12 people	$ 53,600
Direct project expenses:	**$ 53,600**

Basic Text

Objective 7: *Build a range of literature to meet the diverse needs of members and potential members.*

Approach 7.1—*Develop personal stories for the English-language Basic Text that address the diversity of current NA membership and experience.*

Purpose and scope of the project:

To create an approval-form Sixth Edition Basic Text including a new preface, the replacement of some or all of the personal stories, and an introduction to the personal stories. This project ends a six-year process of evaluating potential changes to the Basic Text and initiates the process of revising the text. During this conference cycle, material would be solicited and drafting would begin. However, a review and input of the text as well as the issuing of an approval form would not take place until the 2006–2008 conference cycle, pending conference approval of a new project plan. We plan to have that review open to anyone who requests it.

Substantial time will be spent identifying and targeting specific experience to include in a revised personal stories section. We will use a variety of methods to collect personal experience and stories including *News Flashes*, local contacts, interviews, and audiotapes. In order to eliminate barriers that may make it more difficult for some members to tell their stories (e.g., literacy levels, language differences), we anticipate a high degree of communication between members contributing their experience and workgroup members assigned to this project.

The proposed timeline as published in the September 2003 *NAWS News*:

- July–Dec 2004: Develop a plan for drafting the text and the solicitation process;
- Jan–Dec 2005: Solicit, compile, and make decisions about input material; then put together a first draft of the text;
- Jan–July 2006: Finalize the draft text, filling in any identified gaps;
- Sept–Mar 2007: Fellowship review and input period;
- Sept 2007: Publish the approval form of the text;
- WSC 2008: Approval

Direct expense items:

Translations and mailings	$ 7,000
Personal interviews	$ 5,000
8-9 Meetings for 10 people	$ 107,200
Direct project expenses:	**$ 119,200**

Leadership Identification & Development

Objective 9: *Effectively identify, cultivate, encourage, and support committed, qualified leaders for all levels of the service structure within the fellowship as a whole.*

> **Approach 9.2**—*Evaluate current strategies NAWS uses to identify and cultivate leaders. Evaluate the current World Pool, nominations, and Human Resource Panel systems.*

> **Approach 9.3**—*Establish a NAWS leadership identification and development system. An integral part of this system will include the involvement of delegates and improved use of and ability to identify and access the expertise of the fellowship.*

Purpose and scope of the project:

The purpose of this project is to both evaluate current strategies NAWS uses to identify and cultivate leaders as well as establish a system to enable this identification and cultivation. Evaluations of the current World Pool, nominations, and Human Resource Panel systems will involve the HRP, the World Board, and delegates. The board will begin by having a dialogue with the HRP and framing discussions for WSC 2004. While the board has identified this issue as a priority over the next conference cycle, the specific focus of this work will be better defined by the discussions with the HRP and WSC. Upon conclusion of this discussion and evaluation, the board will be in a better position to establish a NAWS leadership identification and development system. An integral part of this system will include the involvement of delegates as well as an improved use of and increased ability to identify and access the expertise of the fellowship.

The objectives of this project are to initially improve this system in the following areas

Face-to-Face Activities and Events. Utilize face-to-face events and activities more effectively as opportunities to identify and cultivate future leaders.

Leadership Development. Institute an element or focus for leadership development (e.g., orientation, training opportunities, mentoring, etc.) at existing NAWS events, such as WSC, worldwide workshops, WCNA).

Involvement Opportunities. Explore expanded opportunities for involvement that showcase and develop member potential.

HRP/World Pool. Define the role of the HRP and evaluate and implement enhancements to the process of identifying, recruiting, and nurturing qualified volunteers and leaders.

Direct expense items:

4 Meetings for 8 people	$ 44,480
Direct project expenses:	**$ 44,480**

NAWS Communications & Publications

Objective 1: *Develop and disseminate information of high value to intended NA communities and/or service bodies.*

Approach 1.1—*Evaluate how World Services receives input from, reports to, and gets feedback from the fellowship to assist in all stages of the work process.*

Objective 2: *Improve the effectiveness and efficiency of world services' communication with the fellowship.*

Approach 2.1—*Evaluate all NAWS publications for content, approach, and audience and submit recommendations.*

Objective 11: *Continue to build the systems, tools, and operating culture necessary to support strategic management of NAWS.*

Approach 11.1—*Consistently advance the value of a* plan-driven *organization in communications and interaction with the fellowship.*

Purpose and scope of the project:

The purpose of this project is to evaluate and improve how World Services receives input from, reports to, and gets feedback from the fellowship to assist in all stages of the work process. This project will bring some closure to the Communications Task Force report/project and initiate a communications plan that includes standards for reporting and responding to the fellowship. Ultimately, our goal is to develop a comprehensive and deliberate communications strategy for all world services' communications.

The CTF work and an updated report on the problem statements will form part of the foundation of this project. We will take a look at the information that we are putting forward to the fellowship and what kind of input we receive as a result of that communication. In addition, we will examine how the information we hear at workshops, assemblies, and similar events and receive in written communication is captured and incorporated into our work. The result of the project is an improved ability for the fellowship to impact all of NAWS work, including our strategic plan, and the work that comes out of that plan.

The objectives of this project are to initially improve this system by creating:

- Standards for messages communicated through reports and face-to-face interactions with the fellowship
- Standards for responding to the information received at face-to-face interactions and other solicitations for input from the fellowship.
- An interim communications plan for the 2004–2006 conference cycle that includes *The NA Way Magazine.*
- A plan to periodically evaluate the effectiveness of the system.

Direct expense items:

Focus groups	$ 12,000
4 Meetings for 6 people	$ 35,360
Direct project expenses:	**$ 47,360**

Initial priorities Priority but considered "routine" Second ranking Third Ranking

Public Relations Strategy

Objective 3: *Raise awareness and enhance the perception of Narcotics Anonymous as a credible program of recovery.*

> **Approach 3.1**—*Create a public relations strategy.*
> **Approach 3.2**—*Develop a set of PR tools for the fellowship to use in local efforts.*
> **Approach 3.3**—*Gather a broader range of input and perspectives to assess perceptions of NA. Develop methodologies to collect this information throughout the fellowship.*

Purpose and scope of the project:

This project aims to both create a public relations strategy and, with that strategy as a foundation, begin impacting the development of new PR tools.

Using past experience and the information gathered through the PR Roundtables, develop a public relations strategy that allows us to:

- Help the still-suffering addict find the NA program
- Develop and present a positive public image
- Cultivate and maintain cooperative relationships with professionals
- Clarify the role of NA as a resource in the community
- Ensure that our public relations activities are in keeping with the principles of our Twelve Traditions
- Coordinate the focus and approach of NA's PR efforts
- Assess perceptions of NA
- Evaluate the effectiveness of our PR activities

The strategy will be used to evaluate current tools and identify which new tools are needed. New tools should reflect the importance of a common approach to PR and the interdependence of all parts of the fellowship to make these types of efforts a success. This will have some overlap with the PI/PR Handbook proposed in the Service Handbooks project. These tools may include, among other things, materials for:

- Orientation of trusted servants and staff
- Training and coordination within the fellowship
- Community/professional events
- Multimedia information (Internet, PSAs, written material, etc.)
- Quality presentations, adaptable to a variety of audiences
- Periodic collection of data

The approval process for some of these items may vary. The World Board approves any bulletins that are developed. Some material may require conference approval. If conference-approval material is available for distribution well ahead of WSC 2006, the material could be released early, clearly distinguished as "Pending Conference Approval" and identified with a unique header and color. We plan to present the PR Strategy to the conference for approval since this document would outline a long-term strategy for these efforts.

Budget Description

Direct expense items:

6 Workgroup meetings of 8 people	$	66,720
Focus groups	$	12,000
Direct project expenses:	**$**	**78,720**

Service Handbooks

Objective 3: *Raise awareness and enhance the perception of Narcotics Anonymous as a credible program of recovery.*

> **Approach 3.2—***Develop a set of PR tools for the fellowship to use in local efforts.*

Objective 4: *Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.*

> **Approach 4.2—***Improve the existing set of tools (manuals, training/orientation at various forums, facilitation of exchanges between leaders, technology tools, etc.) and support strategies and develop new tools to strengthen the service structure and impart core principles and philosophies.*

Objective 5: *Work to sustain and build all NA communities, recognizing their different levels of development.*

> **Approach 5.1—***Develop tools and plans to address developmental needs of NA communities. Incorporate the broad range of needs of a global fellowship into new and revised service material and handbooks.*

Purpose and scope of the project:

The first handbook that we feel obligated to address is a new draft of the *PI Handbook.* As we reported previously, we believe that a new draft should be created using all available material as a resource, including the current *PI Handbook* and the draft created before 1998. We are committed to completing work on minimally a PI Handbook during this cycle. Our vision of what would best serve the fellowship, however, would be something with an even broader scope, a Public Relations Handbook, that would cover all of the external focuses of our service committees—public information, hospital and institutions, websites, phone lines, etc. We plan to have a discussion with the conference about which focus for a handbook will best serve the needs of our fellowship.

Although this is our top priority, we are very aware of many problems with our other existing handbook material. Although we do not believe that we will be able to complete the work in this conference cycle, we would like the conference's support to create a new handbook for Events and Literature Distribution since the existing handbooks were primarily created in the late 80s. We would like to create new material for all of the areas currently covered by all of the existing handbooks, including *A Guide to Local Service in NA*, as well as developing basics for smaller or newer NA communities. With approval from the conference, we can begin work on some of these materials if resources become available.

The results of all work will be communicated regularly and ultimately presented to WSC 2006. All handbooks will be presented to the conference for approval. In keeping with conference policy, if this material is available for distribution well ahead of WSC 2006, the material could be released early, clearly distinguished as "Pending Conference Approval" and identified with a unique header and color. Because it has been so long since NA world services has developed a new handbook, we plan to create a ninety-day review and input period for the PI/PR material as well as any other handbooks that may be created. The entire handbook may be sent out for review at once, or we may send pieces as they are drafted. The review and input material would be distributed to all delegates, and it would also be available to any member or committee who requests it. We will clearly communicate the timeframes and review periods as the project is developed.

Initial priorities Priority but considered "routine" Second ranking Third Ranking

Direct expense items:

6 Workgroup meetings of 8 people	$	66,720
Focus groups	$	12,000
Direct project expenses:	**$**	**78,720**

Service Material

Objective 4: *Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.*

> **Approach 4.2—***Improve the existing set of tools (manuals, training/orientation at various forums, facilitation of exchanges between leaders, technology tools, etc.) and support strategies and develop new tools to strengthen the service structure and impart core principles and philosophies.*

Objective 5: *Work to sustain and build all NA communities, recognizing their different levels of development.*

> **Approach 5.1—***Develop tools and plans to address developmental needs of NA communities. Incorporate the broad range of needs of a global fellowship into new and revised service material and handbooks.*

Objective 6: *Broaden availability of the Narcotics Anonymous message to a widely diverse membership and potential membership.*

> **Approach 6.1—***Frame issues related to the Third Tradition and the actual availability of our message regardless of age, race, creed, sexual identity, religion, etc. Develop targeted tools about these issues for different audiences and events from home group meetings to worldwide workshops and initiate a dialogue.*

Purpose and scope of the project:

To create new and/or revised material on service and topics concerning NA philosophy to better serve a growing and changing worldwide fellowship.

The initial topics prioritized are:

Priority (in order)

- Giving the newcomer a chance to recover (behavior at meetings)
- Availability of the NA message regardless of age, race, sexual identity, creed, religion, or lack of religion (Third Tradition material)

Second ranking (not necessarily in order)

- Disruptive people at meetings
- Activities and financial responsibility
- Information on a range of financial issues
- Revision of existing bulletins
- The WSC for beginners

Third ranking (not necessarily in order)

- Common needs
- Anonymity

Our top priority, *Giving the newcomer a chance to recover*, comes from multiple sources. In responding to the 2002–2004 issue discussion topic, *Atmosphere of Recovery*, members reported their difficulties trying to find recovery in our meetings. The issues those members raised are the same that we hear at the office and during the PR Roundtables that we conducted. Although we believe that this topic could make a good IP, we plan to begin addressing this topic through *The NA Way Magazine* and by developing a bulletin. The next item, *Availability of the NA message*, also stems from input that we have heard repeatedly. For this topic we have discussed creating a dialogue related to the Third Tradition and the actual availability of our message to anyone who suffers from addiction, *regardless of age, race, creed, sexual identity, religion, etc*. We see this topic best served by developing tools for discussion by different audiences and at different events from home group meetings to worldwide workshops.

Two of the other priorities, *Disruptive people at meetings* and *Anonymity*, have also recurred as important issues in the input we have received on *Atmosphere of Recovery*. Most of the other topics, from *Activities and financial responsibility* to *WSC for beginners*, are in response to inquiries from delegates, committees, and members to the office and/or the board.

The approval process for some of these items may vary. The World Board approves bulletins, and some material may require conference or fellowship approval. If conference-approval material is available for distribution well ahead of WSC 2006, the material could be released early, clearly distinguished as "Pending Conference Approval" and identified with a unique header and color.

Direct expense items:

3 Workgroup meetings for 10 people	$	40,200
Direct project expenses:	**$**	**40,200**

Leadership Qualities in NA

Objective 9: *Effectively identify, cultivate, encourage, and support committed, qualified leaders for all levels of the service structure within the fellowship as a whole.*

> **Approach 9.1**—*Define leadership qualities in NA that speak to members, groups, areas, regions, and world services. Concept Four will be used as the foundation. This will also consider the personal and cultural differences in the practice of leadership in NA.*

Purpose and scope of the project:

The purpose of this project is to develop a useful working definition of or piece about leadership qualities in NA that will speak to the needs and experience of members, groups, areas, regions, and world services. Concept Four will form the foundation of any drafts created. The practice of leadership varies widely from member to member and culture to culture; to be effective, this work must take this diversity into consideration.

We believe that this project will be important as a foundation for future work, rather than leading to a particular product or end result itself. Once this material is developed, we plan to use the Conference Approval Track to have it approved but do not see this becoming a handbook or piece that stands on its own. If the draft is approved by the conference, we plan to engage WSC 2006 in a discussion about how this foundational piece could be used most effectively.

Direct expense items:

Translations and mailings	$ 5,000
3 Meetings for 8 people	$ 33,360
Direct project expenses:	**$ 38,360**

Self-Support IP

Objective 13: *Raise awareness and a sense of responsibility on the part of the fellowship for the need to adequately fund the cost of NAWS services.*

Approach 13.2—Create *a new IP that reflects current contribution practices in NA and encourages our members to see self-support as having intrinsic value.*

Purpose and scope of the project:

We propose to draft a new IP that reflects current contribution practices in NA and encourages our members to see self-support as having intrinsic value. We are proposing an IP because the audience for this piece is primarily members and groups, and we believe that we can draft a more effective tool than the current IPs. It is our hope that this new IP could replace both *Self-Support* and *Hey! What's the Basket For?*, but this decision would be made by the fellowship through a motion in the *Conference Agenda Report*.

The results of all work will be communicated regularly to conference participants and ultimately presented to WSC 2006. We plan to create a ninety-day review and input period for the draft and a one-hundred-fifty-day approval process through a motion in the *CAR*. The review and input material would be distributed to all delegates and would also be available to any member or committee who requests it. We will clearly communicate the timeframes and review periods as the project is developed.

Direct expense items:

3 Workgroup meetings for 8 people	$ 33,360
Direct project expenses:	**$ 33,360**

Service Structure Relationship & Definition

Objective 4: *Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.*

Approach 4.1—*Define the role and importance of each level of the service structure as it relates to accomplishing NA's overall vision, primary purpose, and goals.*

Purpose and scope of the project:

As stated above, we plan to define the role, importance, and responsibility of each level of the service structure and its components and define how each relates to accomplishing NA's overall vision, primary purpose, and goals. We see this foundation as necessary since practices have changed over the years and vary in many places. This should include a focus on the relationship with the delegates as partners with the World Board. The board will define the role and relationship of the staff and the World Board.

We believe that this project will be important as a foundational piece rather than as an end result. Once developed, we plan to use the Conference Approval Track to have this material approved but do not see this becoming a handbook or piece that stands on its own. If the draft is approved by the conference, we plan to engage WSC 2006 in a discussion about how this foundational piece could be used most effectively.

Direct expense items:

3 workgroup meetings of 8 people	$ 33,360
Focus groups	$ 12,000
Direct project expenses:	**$ 45,360**

Targeted Literature

Objective 7: *Build a range of literature to meet the diverse needs of members and potential members.*

Approach 7.2—*Create articles, bulletins, or information pamphlets that address the needs of specific populations in NA.*

Purpose and scope of the project:

We plan to create new and/or revised material addressing specific populations of members or potential members. This may be accomplished by creating articles, bulletins, or new IPs, or by revising existing IPs. The populations and/or topics identified are:

Priority (not necessarily in order)

- youth and recovery
- medication and recovery

Second ranking (not necessarily in order)

- the benefit of service to personal recovery
- the spiritual development of members with longer clean time and how to continue to engage them in the fellowship of Narcotics Anonymous

Third ranking (not necessarily in order)

- older members and recovery
- issues regarding gender

We believe our top priorities, youth and recovery and medication and recovery, would be best addressed by creating a new IP for *Youth and Recovery* and by revising *In Times of Illness*. The current *Youth and Recovery* IP is outdated, and members responding to the literature surveys have requested a replacement. We have discussed the current draft of *In Times of Illness* at the worldwide workshops and the PR Roundtables. Both audiences have noted that the current draft is inadequate to address the needs of members today, rather than seeing a problem with what is already written. Since we intend to broaden the scope of this booklet, the name *In Times of Illness* may not best describe the scope of the new piece, but we are unable to provide a definitive title at this time.

The benefit of service to personal recovery is something that has been chosen as a topic to discuss at every worldwide workshop. Although this IP would address the needs of all members, those members currently in service have identified it as a priority. The remainder of the topics stem from member input—in surveys and at events—as well as board discussions.

The results of all work will be communicated regularly to conference participants and ultimately presented to WSC 2006. Approval methods would vary, depending on the type of text. For IPs, a ninety-day review and input period would be created as well as a one-hundred-and-fifty day approval period through the *Conference Agenda Report*. The review and input material would be distributed to all delegates, and it would also be available to any member or committee who requests it. We will clearly communicate the timeframes and review periods as the project is developed. If bulletins were developed instead, the World Board would approve them.

Initial priorities **Priority but considered "routine"** Second ranking Third Ranking

Direct expense items:

6 Workgroup meetings of 10 people	$	80,400
Focus groups	$	12,000
Direct project expenses:	**$**	**92,400**

Capturing Long Time Members' Experience

Purpose and scope of the project:

The purpose of this project is to gather historical information from some of the longest standing members in NA by conducting personal interviews and possibly meetings with these members throughout the world.

Direct expense items:

Personal interviews	$ 20,000
1–2 meetings for 12 Members	$ 35,360
Direct project expenses:	**$ 55,360**

Consensus-Based Decision-Making at the WSC

Objective 4: *Clarify the roles and support the work of each level of the service structure of Narcotics Anonymous.*

> *Approach 4.2—Improve the existing set of tools (manuals, training/orientation at various forums, facilitation of exchanges between leaders, technology tools, etc.) and support strategies and develop new tools to strengthen the service structure and impart core principles and philosophies.*

Purpose and scope of the project:

The purpose of this project is to define consensus for the WSC and develop guidelines for consensus-based decision-making that will be included in the WSC Rules of Order. We did not prioritize this item as high as the tools for the fellowship, so the approach and this project indicate different priority rankings.

Direct expense items:

3 Meetings for 8 people	$ 33,360
Direct project expenses:	**$ 33,360**

Fellowship Issue Discussions

Objective 1: *Develop and disseminate information of high value to intended NA communities and/or service bodies.*

Approach 1.1—Evaluate how World Services receives input from, reports to, and gets feedback from the fellowship to assist in all stages of the work process.

Purpose and scope of the project:

The purpose of this project is to both facilitate fellowship-wide discussion of specific issues and to improve the quality of that facilitation. The first step in this project is for the board to discuss how to frame, promote, and further develop the structure for having dialogue within the fellowship as a whole. The board will begin by reviewing reports summarizing the content and process of the issue discussions from the last conference cycle: *Atmosphere of Recovery* and *Self-Support*. (These topics were selected by the WSC in 2002.) After the conference selects two new topics for the next conference cycle, the board will have a discussion about framing the discussion of these topics and facilitate their discussion throughout the fellowship.

Direct expense items:

Personal interviews	$ 3,000
3 Meetings for 8 people	$ 33,360
Direct project expenses:	**$ 36,360**

Literature Distribution & Convention Workshop

Objective 12: *Ensure the long-term reliability of the NAWS income stream in order to carry out identified priorities and service.*

> ***Approach 12.6***—*Revise financial management policies to better meet the needs of the organization.*

Purpose and scope of the project:

To hold two workshops concurrently, one focused on literature distribution for area and regional customers and one on convention planning. Both programs are structured around the basics of providing these two types of service, accountability, and handling of funds. Some of the subject matter may vary according to the interests and needs of the attendees.

We see this project as related to Objective Twelve, because although this project may not directly impact the NAWS income stream, it does impact resources in areas and regions throughout the fellowship. We find it necessary to include this as a possibility for the next conference cycle due to the amount of theft reported and the difficulty experienced with the distribution of literature and convention planning.

Direct expense items:

Travel for 10 people	$ 13,400
Funding pool	$ 12,000
Location expenses	$ 3,000
Direct project expenses:	**$ 28,400**

Worldwide Workshops

Purpose and scope of the Workshops:

To hold up to six workshops in this conference cycle throughout the fellowship. Their purpose will be to engage in various discussions on a variety of service and recovery issues with as many members as possible.

Since we did not designate this a top priority, we are unable to determine a possible schedule until we have discussions with the conference.

Direct expense items:

8–10 Travelers per workshop	$ 80,000
Meeting space, equipment rental, mailings, literature, etc. at an average of $12,000 per workshop	$ 72,000

Direct workshop expenses: $ 152,000

NARCOTICS ANONYMOUS WORLD SERVICES, INC.
PROPOSED BUDGET FOR FISCAL YEARS 2004 - 2006

INCOME

	Actual Income & Expense from July 2002 - June 2003	Proposed Base July 2004 - June 2005	Variable Expenses for Projects 2004 - 2005	Proposed Base July 2005 - June 2006	Variable Expenses for Projects 2005 - 2006	Consolidated Base for Fiscal Years 2004-2006
RECOVERY LITERATURE INCOME						
BASIC TEXT: Hardcover English	1,800,551	1,818,557		1,818,557		3,637,113
BASIC TEXT: Translated	114,935	116,084		116,084		232,169
BASIC TEXT: Softcover	656,001	662,561		662,561		1,325,122
JUST FOR TODAY	688,375	695,259		695,259		1,390,518
IT WORKS: HOW & WHY	634,354	640,698		640,698		1,281,395
STEP WORKING GUIDES	583,934	589,773		589,773		1,179,547
OTHER RECOVERY LITERATURE	1,352,468	1,365,993		1,365,993		2,731,985
Subtotal	5,830,618	5,888,924		5,888,924		11,777,848
OTHER INVENTORY INCOME						
MEDALLIONS	490,273	495,176		495,176		990,351
KEY TAGS & CHIPS	864,081	872,722		872,722		1,745,444
NON-FIPT INFORMATION BOOKLETS	48,203	48,685		48,685		97,370
HANDBOOKS	58,801	59,389		59,389		118,778
SPECIALTY ITEMS	33,790	34,128		34,128		68,255
AUDIO MATERIALS	37,775	38,153		38,153		76,306
GROUP/AREA MATERIALS	70,561	71,266		71,266		142,533
MIRACLES HAPPEN	32,273	32,596		32,596		65,191
Subtotal	1,635,756	1,652,114		1,652,114		3,304,228
SHIPPING	303,863	308,573		317,059		625,632
DISCOUNTS	(1,171,800)	(1,183,518)		(1,183,518)		(2,367,036)
DEVELOPMENTAL SUBSIDIES & ALLOWANCES	(105,204)	(106,256)		(106,256)		(212,512)
Gross Literature Income	6,499,233	6,559,837		6,568,323		13,128,160
RECOVERY LITERATURE COST OF GOODS						
BASIC TEXT: HARD COVER - English	318,954	322,144		330,197		652,341
BASIC TEXT: Translated	31,576	31,892		32,689		64,581
BASIC TEXT: Softcover	70,079	70,780		72,549		143,329
JUST FOR TODAY	79,308	80,101		82,104		162,205
IT WORKS: HOW & WHY	147,112	148,583		152,298		300,881
STEP WORKING GUIDES	113,323	114,456		117,318		231,774
OTHER RECOVERY LITERATURE	251,224	253,736		260,080		513,816
Subtotal	1,011,576	1,021,692		1,047,234		2,068,926
OTHER INVENTORY COST OF GOODS						
MEDALLIONS	80,096	80,897		82,919		163,816
KEY TAGS & CHIPS	207,913	209,992		215,242		425,234
NON-FIPT INFORMATION BOOKLETS	28,042	28,322		29,030		57,353
HANDBOOKS	19,198	19,390		19,875		39,265
SPECIALTY ITEMS	10,650	10,757		11,025		21,782
AUDIO MATERIALS	11,671	11,788		12,082		23,870
GROUP/AREA MATERIALS	30,733	31,040		31,816		62,857
MIRACLES HAPPEN	9,226	9,318		9,551		18,869

MIRACLES PAPER

Subtotal	$ 397,529	$ 401,504	$ 411,542	$ 813,046
Total Cost of Good Sold	$ 1,409,105	$ 1,423,196	$ 1,458,776	$ 2,881,972

FELLOWSHIP DONATIONS

BREAKDOWN BY DONOR TYPE

Members	$ 10,142	$ 10,142	$ 10,649	$ 20,791
Groups	$ 39,448	$ 39,448	$ 41,420	$ 80,868
Areas	$ 78,849	$ 78,849	$ 82,791	$ 161,640
Regions	$ 526,417	$ 440,000	$ 440,000	$ 880,000
Events/Conventions	$ 21,859	$ 21,859	$ 22,952	$ 44,811
Unity Day	$ 19,556	$ 19,556	$ 20,534	$ 40,090
Zonal & Other Forums	$ 6,497	$ 6,497	$ 6,822	$ 13,319

EVENT INCOME

UNITY DAY	$ 599	$ -	$ -	

MISCELLANEOUS INCOME

LICENSED VENDOR PAYMENTS	$ 17,050	$ 17,050	$ 18,050	$ 35,100
INTEREST	$ 26,233	$ 26,495	$ 26,628	$ 53,123
MISCELLANEOUS	$	$	$	$

OPERATING INCOME (Not including event specific)	$ 5,830,778	$ 5,796,537	$ 5,779,393	$ 11,575,930

EXPENSE BY ACTIVITY AREA

LITERATURE PRODUCTION & DISTRIBUTION

FIXED OPERATIONAL EXPENSES

MARKETING	$ 79,231	$ 80,023	$ 82,024	$ 162,047
IN HOUSE PRODUCTION	$ 18,850	$ 48,834	$ 50,054	$ 98,888
TRANSLATIONS	$ 21,996	$ 22,216	$ 22,771	$ 44,987
SHIPPING	$ 325,334	$ 328,587	$ 336,802	$ 665,389
LEGAL	$ 11,158	$ 11,381	$ 11,950	$ 23,331
TRAVEL	$ 3,355	$ 3,422	$ 3,593	$ 7,016
ACCOUNTING	$ 10,673	$ 11,206	$ 11,767	$ 22,973
PERSONNEL	$ 839,965	$ 881,862	$ 908,386	$ 1,790,248
OVERHEAD	$ 364,899	$ 416,347	$ 437,165	$ 853,512
TECHNOLOGY	$ 43,147	$ 44,416	$ 46,637	$ 91,054
Subtotal Literature Production	$ 1,718,609	$ 1,848,295	$ 1,911,150	$ 3,759,446

VARIABLE OPERATIONAL EXPENSES

Business Plan Workgroup		$ 26,800	$ 26,800	$ 26,800
Literature & Convention Workshop		$	$	$ 28,400
Total Variable Project Expenses for Literature Production	$ -	$ 26,800	$ -	$ 55,200

Total Literature Production	$ 1,718,609	$ 1,848,295	$ 1,911,150	$ 3,759,446

NARCOTICS ANONYMOUS WORLD SERVICES, INC.
PROPOSED BUDGET FOR FISCAL YEARS 2004 - 2006

	Actual Income & Expense from July 2002 - June 2003	Proposed Base July 2004 - June 2005	Variable Expenses for Projects 2004 - 2005	Proposed Base July 2005 - June 2006	Variable Expenses for Projects 2005 - 2006	Consolidated Base for Fiscal Years 2004-2006
WORLD SERVICE CONFERENCE SUPPORT						
FIXED OPERATIONAL EXPENSES						
PUBLICATIONS	$ 21,726	$ 22,161		$ 23,269		$ 45,429
WORLD SERVICE CONFERENCE	$ 6,514	$ -		$ 290,000		$ 290,000
WORLD BOARD	$ 165,278	$ 168,584		$ 177,013		$ 345,596
HUMAN RESOURCE PANEL	$ 14,132	$ 14,415		$ 15,135		$ 29,550
WSC CO-FACILITATOR	$ -	$ -		$ 3,450		$ 3,450
CONFERENCE RELATED TRAVEL	$ 10	$ 28,000		$ 43,000		$ 71,000
LEGAL	$ -	$ -		$ -		$ -
ACCOUNTING	$ 8,475	$ 8,325		$ 8,741		$ 17,066
PERSONNEL	$ 665,750	$ 653,966		$ 673,613		$ 1,327,579
OVERHEAD	$ 296,869	$ 316,709		$ 332,544		$ 649,253
TECHNOLOGY	$ 34,264	$ 32,995		$ 34,645		$ 67,640
Subtotal World Service Conference Support	$ 1,213,018	$ 1,245,154		$ 1,601,410		$ 2,846,564
VARIABLE OPERATIONAL EXPENSES						
NAWS Communications and Publications			$ 47,360		$ 22,240	
Leadership Identification & Development			$ 22,240		$ 22,240	
Leadership Qualities in NA			$ 27,240		$ 11,120	
Consensus-Based Decision Making at the WSC			$ 22,240		$ 11,120	
Capturing Long Time Members' Experience			$ 35,360		$ 20,000	
Worldwide Workshops	$ 69,259		$ 76,000		$ 76,000	
Total Variable Project Expenses for World Service Conference	$ 69,259	$ 69,259	$ 230,440	$ -	$ 140,480	$ -
Total World Service Conference Support	$ 1,282,277	$ 1,245,154		$ 1,601,410		$ 2,846,564
FELLOWSHIP DEVELOPMENT						
FIXED OPERATIONAL EXPENSE						
PUBLICATIONS	$ 113,900	$ 165,000		$ 173,250		$ 338,250
FELLOWSHIP SUPPORT	$ 32,530	$ 33,181		$ 34,840		$ 68,020
PROFESSIONAL EVENTS	$ 31,612	$ 32,244		$ 33,856		$ 66,10l
DEVELOPMENTAL LITERATURE	$ 134,133	$ 136,816		$ 143,656		$ 280,472
ARCHIVES & INFORMATION MANAGEMENT	$ 73,316	$ 51,000		$ 51,000		$ 102,000
LEGAL	$ -	$ -		$ -		$ -
ACCOUNTING	$ 7,220	$ 9,926		$ 10,422		$ 20,348
PERSONNEL	$ 565,941	$ 778,046		$ 801,387		$ 1,579,433
OVERHEAD	$ 181,734	$ 347,113		$ 387,203		$ 734,316
TECHNOLOGY	$ 29,188	$ 39,340		$ 41,307		$ 80,648
Subtotal	$ 1,169,574	$ 1,592,665		$ 1,676,922		$ 3,269,587
VARIABLE OPERATIONAL EXPENSES						
Basic Text			$ 59,600		$ 59,600	
Public Relations Strategy			$ 56,480		$ 22,240	
Service Material			$ 26,800		$ 13,400	
Service Handbooks			$ 56,480		$ 22,240	

Self-Support IP		$ 33,360		$ 11,120
Service StructureRelationship & Definition		$ 34,240		$ 26,800
Targeted Literature		$ 65,600		
Fellowship Issue Discussions		$ 24,240		$ 12,120
Total Variable Project Expenses for Fellowship Development $	-	$ 356,800	$ -	$ 167,520
Total Fellowship Development $ 1,169,574	$ 1,592,665	$ 1,676,922	$ 3,269,587

EVENTS

PROFESSIONAL EXPENSE

FUTURE CONVENTION PLANNING	12,740	12,995	13,645	26,639
LEGAL	-	-	-	-
ACCOUNTING	5,022	2,561	2,690	5,251
PERSONNEL	402,038	200,786	215,567	416,353
OVERHEAD	176,172	95,165	104,713	199,878
TECHNOLOGY	20,305	10,152	10,660	20,812
Total Events $	616,277	321,660	347,274	

NAWS EXPENSE WITHOUT EVENT SPECIFIC $	4,786,737	5,007,773	5,546,756	10,554,530

| Excess Revenue/Expense (excludes event specific) $ | 1,044,041 | 788,764 | 242,637 | 1,031,401 |

EVENT SPECIFIC	Proposed July 2005 - June 2006	Consolidated 2004-2006 Total
NET PROJECT INCOME		
REGISTRATION	$ 282,500	$ 282,500
SPECIAL EVENTS	$ 248,000	$ 248,000
NEWCOMER DONATIONS	$ 6,000	$ 6,000
MERCHANDISE	$ 292,500	$ 292,500
OTHER SALES	$ 17,000	$ 17,000
REBATES	$ 75,000	$ 75,000
TOTAL PROJECT INCOME		
NET DIRECT EXPENSE		
REGISTRATION	$ 104,700	$ 104,700
SPECIAL EVENTS	$ 190,100	$ 190,100
PROGRAM	$ 94,500	$ 94,500
MERCHANDISE	$ 194,000	$ 194,000
FACILITIES	$ 157,000	$ 157,000
SUPPORT COMMITTEE	$ 34,900	$ 34,900
ADMINISTRATION	$ 99,450	$ 99,450
TOTAL EVENT SPECIFIC EXPENSE		
Total Event Specific Excess Revenue/Expense $		
Excess Revenue/Expense with event specific $ 1,044,041	788,764	288,987	1,077,751

NARCOTICS ANONYMOUS WORLD SERVICES, INC.
PROPOSED BUDGET FOR FISCAL YEARS 2004 - 2006

CASH BASIS	02-03 ACTUAL	PROJECTED 02-04 CONSOLIDATED	04-05 PROPOSED	05-06 PROPOSED	04-06 CONSOLIDATED
ADJUST FOR NON-CASH ITEMS					
INCOME OVER EXPENSE INCLUDING CONTINGENT WSC ITEMS	1,378,246	1,437,561	788,764	288,987	1,077,751
AMORTIZATION	105,411	219,643	122,079	128,212	250,291
DEPRECIATION	104,101	210,994	110,172	105,296	215,468
TOTAL ADJUSTMENTS FOR NON-CASH ITEMS	1,587,758	1,868,198	1,021,015	522,495	1,543,510
CAPITAL FUNDS UTILIZATION					
COMPUTER EQUIPMENT	(56,793)	(107,620)	(49,700)	(38,900)	(88,600)
DATABASE SOFTWARE & SYSTEM ENHANCEMENTS	(77,126)	(214,467)	(39,000)	(39,000)	(78,000)
OFFICE EQUIPMENT	(7,611)	(37,559)	(61,000)	(61,000)	(122,000)
FURNITURE	(17,133)	(34,168)	(12,500)	(9,500)	(22,000)
LEASEHOLD IMPROVEMENTS	(4,648)	(141,602)	(37,500)	(20,000)	(57,500)
TRADEMARKS & COPYRIGHTS	(23,551)	(62,979)	(63,000)	(63,000)	(126,000)
CAPITAL LOAN REPAYMENT	(45,833)	(91,666)	-	-	-
TOTAL	(232,695)	(690,061)	(262,700)	(231,400)	(494,100)
ADDITIONAL CONTINGENT UTILIZATION OF CASH					
DEDICATION TO SAVINGS		(114,000)			
ARCHIVE PRESERVATION & RESTORATION- increased activity	-	(30,000)	(27,000)	(27,000)	(54,000)
PROPOSED PROJECT PLANS 1-16			-	-	-
TOTAL CONTINGENT USE OF CASH		(144,000)	(27,000)	(27,000)	(54,000)