

AREA PLANNING TOOL

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Area Planning Tool

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AREA PLANNING TOOL

Purpose and benefits of planning

Why plan?

The one-sentence answer to that question is that planning helps us better carry the message to the addict who still suffers. Planning helps any service committee come together to determine where services are most needed and decide how best to move toward agreed-upon goals.

The aim of an area service committee (ASC) is to coordinate services on behalf of the groups served by that area. In essence, an area is the way in which all groups join together in an effort to further NA's primary purpose—to make our message of recovery available and accessible to everyone in their community.

When there is no planning, it's easy for areas to function in a vacuum. Often a service body will move forward in a status quo fashion—"this is the way we have always done it" may be the theme song. And with this theme song, areas may find that their committees do not work together with each other, with the group service representatives (GSRs), and with the administrative body.

This planning process is also beneficial for regions and zones. The focus here is on the area service committee, yet the planning steps can be applied to regional and zonal service settings. Whether the service body is an area, region, or zone, we encourage members to use the planning process.

Benefits of planning

T*o fulfill our fellowship's primary purpose, the NA groups have joined together to create a structure which develops, coordinates, and maintains services on behalf of NA as a whole.*

First Concept

As addicts, we know how it feels when others make decisions for us. Many of us lived our lives by default in active addiction. Just as recovery allows us to become "acceptable, responsible, and productive" individuals, it also allows us to incorporate these qualities in our service efforts. Through planning, each member of the area service committee is better able to participate in responsible choice-making, and members' contributions are valued.

Planning helps us focus and coordinate service activities on behalf of the groups. We join together with the knowledge that our service efforts will help ensure that no addict seeking recovery need die from the horrors of addiction.

Who plans?

All trusted servants of an area service committee participate in planning; however, certain members need to be entrusted with the responsibility of setting the planning process into action. In many areas, this responsibility would fall to the administrative body of the area,

with the area chairperson typically facilitating the process. Some areas may choose to create an ad hoc committee whose membership is composed of various trusted servants along with the administrative body.

For each responsibility assigned to the service structure, a single point of decision and accountability should be clearly defined.

Fifth Concept

Why the administrative body? Those trusted servants are elected by the area and are accountable to the area as a whole. The area chairperson facilitates the discussion during the

ASC meetings and, often together with other members of the administrative body, is responsible for setting the agenda of the area meeting. Of course, there may be instances when an area body may choose a different member to facilitate the process, but for continuity and accountability, we suggest using the area chairperson. Your regional delegate or another experienced member not currently serving at the area may also be used, which allows the area chairperson to participate in these discussions.

Remember...

The planning process will benefit from a facilitator who is familiar with the planning steps, able to engage members, and able to keep the body focused on the task at hand.

Preparation

Once an area service committee decides to proceed with planning for its services, adequate time should be allocated. Trusted servants of the area, including the GSRs, should be given time to inform groups and members of the area about the planning process and scheduled meeting date(s). Providing an opportunity for everyone who desires to be involved in the process is an important aspect of planning. The process may benefit from the participation of experienced members who are not currently of service to the area and of new members.

There are things that need to be considered before members can actually sit down and plan. A few simple, straightforward actions can help the planning sessions to be productive and fulfilling for all members involved.

- ◆ **Meeting space** — Is the size of the meeting room adequate? Does the meeting room provide for the creation of small groups during brainstorming sessions? Is the meeting space easily accessible—in a central location for most members of the area?
- ◆ **Communication** — Is there enough time to give adequate notice of the upcoming planning meeting? Have the days, times, and locations of planning sessions been communicated to members of the area?

There are seven planning steps: gathering information, listing the issues, developing goals, prioritizing goals, creating approaches, prioritizing approaches, and developing an action plan. Each step is necessary to the overall development and creation of the plan.

- ◆ **Commitment** — The seven action steps to this planning process may occur in one meeting or over a course of two or three meetings. We want to inform the members of the number and dates of the planning meetings to help ensure that members participating in the process remain consistent throughout the planning.
- ◆ **Planning materials** — Each table will benefit from having paper and pens. As thoughts and ideas arise, we want to be able to write them down. The facilitator needs large paper or post-it pads and markers to record the information from the discussions so every member can read what is recorded.
- ◆ **Refreshments** — Has the area committee discussed providing coffee, tea, water, or snacks for the planning sessions? In this discussion, we may want to consider the volunteer commitment and the importance of creating a welcoming, hospitable atmosphere. Sometimes service bodies do not realize that providing refreshments helps to promote a sense of community.

The seven planning steps

Key topics

- ❶ **Gathering information**
- ❷ **Listing the issues**
- ❸ **Developing goals
(identify “what,” not “how”)**
- ❹ **Prioritizing goals**
- ❺ **Creating approaches
(actions to reach goals)**
- ❻ **Prioritizing approaches
(a second look)**
- ❼ **Developing an action plan**

1 Gathering information – step one

This can be accomplished through an area inventory, or through some other, more informal process. What’s important is that the planning process begins with trusted servants identifying what services are working, where improvement is needed, and whether services are absent. It’s essential for this step to address both how the area is functioning internally and how the area is interacting with the larger community—how this information is gathered is less important. The following four topics can help ensure that the area looks at itself, as well as outside of itself:

- ◆ How well has the area done this year in serving the groups, and how can it better serve them in the coming year?
- ◆ How well has the area committee served the larger community, and how can it improve?
- ◆ How well has the area functioned in the past year? Do area subcommittees and trusted servants understand the work assigned to them?
- ◆ How well has the ASC supported and collaborated with NA’s regional and world services? How can the area provide better support for these services?

Remember...

A key to this step is for the area to begin thinking about itself from a new perspective. For example, members may not regularly consider what the groups want from the area, and what might be lacking in those relationships. If groups don't participate at the area meeting, for instance, the area can use this step to think about ways to give those groups attention and support. In addition, this step can help the area to think about its relationships in the community, and whether or not NA is seen as a reliable and credible program of recovery. All of these relationships—both with each other in the area and with those outside of NA—help in the work of carrying NA's message to suffering addicts.

Every service committee or organization develops patterns of behavior over time. This is an opportunity for a frank discussion about what behaviors at the area meeting and with its subcommittees are working and what can be improved. Do new GSRs know what is expected of them? Is the area meeting welcoming and effective? Does the area understand and take responsibility for its subcommittees and the work they have been asked to do on the area's behalf?

Reviewing the area's relationships with regional and world services is also important to this step. Members may begin to recognize support that's been available but never used. Regional trusted servants, for example, may have experience that could help improve services and strengthen subcommittees.

This step allows the area to think about itself in a new way; looking closely at our relationships with those outside of NA, as well as the ties that bind us inside NA, helps to ensure a thorough planning process.

There is a sample area inventory in the addenda to this document. An area could consider sending an inventory such as this one to the groups, compile the information, and then proceed with step two. Or an area may want to begin gathering information in the area service meeting and move right on to step two. Some areas routinely take an inventory and will use that inventory for this step. There is no wrong way to begin this planning process.

2 Listing the issues – step two

Through the information-gathering process, the ASC has accumulated a wealth of information. The area now begins the process of identifying issues in order to resolve service areas that do not function well and improve services.

This step is usually best accomplished by using small groups with six to ten members in each group. In small groups, members can freely share ideas and brainstorm solutions. A time should be set, say, thirty to sixty minutes, to review the information that has been gathered and then to create a list of issues in each small group.

Facilitation tip

While the small groups are brainstorming issues, the facilitator can review the gathered information and create an initial list of broad categories. Broad topics might include *training and mentoring, relationships with the community, financial issues, cooperation among subcommittees, etc.* The facilitator then brings the entire group back together and asks members from the small groups to share the issues they developed during brainstorming. The facilitator lists each specific issue under the broad categories (for example, lack of informed GSRs can go under training and mentoring; meetings being asked to leave facilities can go under relationships with the community). If there are issues that fall outside of the already-created categories, the group can create a new category. There will likely be overlapping issues listed under the broad categories. **The goal of this step is for the group to identify the broad categories with a list of specific examples for each category.**

3 Developing goals (identify “what,” not “how”) – step three

Now begins the process of creating goals to address the broad categories and specific issues listed underneath. For example, if “training and monitoring” was listed as a broad category with several specific issues listed underneath, the goals might be *regularly scheduled learning days, overlapping terms for all trusted servants, GSR orientation, and area support is available to train group-level trusted servants.* Goals are clear, concise, and result-oriented statements that are achievable. The key is for the goal to be an outcome or a result. The body can again use small groups to create goals for the broad category that contains the identified issues.

Facilitation tip

Be sure to remind the group that setting goals does not include discussing how to achieve the goal. The task is simply to identify the outcome. Also remind the group that some goals can be met quickly, some will take a year to achieve, while others may span over a longer period. After the small groups have created goals, the facilitator can write out each identified goal with the issue it attempts to address listed underneath.

4 Prioritizing goals – step four

Now the entire group looks over the list of goals and prioritizes the list. When considering which goal is a priority, it may be wise to consider the area's human and

Remember...

If the planning process does not take place during the actual area service committee meeting, the planning group presents the plan to the ASC for full adoption.

financial resources, as well as which goals seem most urgent to complete. Every member has a set number of goal choices (for example, each member will choose his or her top five priorities) and makes a mark (check, star, dot, etc.) next to each goal that is considered a priority. When all participants have made their choices, the facilitator will count and mark which goals have received the most choices. The goals with the highest number of marks become the priority issues for the area.

5 Creating approaches (actions to reach goals) – step five

What is an approach? An approach describes how to reach a specific goal—what steps an area has to take to achieve its identified and prioritized goals. The plan to reach a goal takes into consideration all current area efforts, the information that was gathered from the groups and area inventory sessions, and new ideas. In the interest of simplicity, members may want to limit the number of steps to achieve each goal to two or three.

In creating approaches, the group may recognize that the area already has some existing approaches for some of the identified goals. Areas often have steps to reach their goals, yet frequently haven't discussed these during service meetings or through any area planning process. If a current strategy is working, then include that under existing approaches.

Facilitation tip

Remember that this is often where we get stuck! We can agree on what needs to be done but argue about how it should be accomplished. Following are two options for how to proceed with developing approaches: **1)** The first option is for the planning body to break into small groups to develop approaches. In this option, each small group is responsible for developing ways to reach one goal and then reports their approach to all members present. Members of the large group can offer their ideas to the small group as each group shares their ideas.

2) Another option is for the area administrative body or area subcommittee to develop approaches to be presented at the ASC meeting. Asking a particular subcommittee to create approaches for identified goals, particularly if the identified goal pertains to that committee, can be a useful option, just as it may make the most sense to ask the administrative body to develop approaches that pertain to how the area operates.

6 Prioritizing approaches (a second look) – step six

The planning body now needs to consider prioritizing the approaches for each goal. Members review each goal and the identified steps, keeping human and financial area resources in mind. Are there enough willing members to achieve this approach? Will the area be able to continue providing existing services while adding this approach to achieve a stated goal? While considering the area's resources, members also think about whether this is the best approach to reach a goal and address whether this is a critical issue for area service provision.

This reprioritization process is deliberate and decisive. Members simply rank the developed approaches, clearly identifying their priorities using a number ordering system of 1, 2, and 3. Even though this may be difficult, a numbering system sets firm parameters, and these can be very helpful.

Remember...

An area should remain focused on its goals and the actions to achieve these goals, rather than be thrown off course with “new ideas” that could come up during a year. Sometimes unanticipated, seemingly urgent issues may surface during a year. For example, six months into the area plan, a GSR might make a motion to have an area convention. A plan gives an area a way to evaluate these issues or concerns more responsibly by reviewing them against the area's prioritized goals. A question to ask may be: *Does this idea, opportunity, or request fit within the goals and priorities an area has identified for*

a year? Answering this question helps an area service committee remain focused on its prioritized goals rather than be sidetracked by new ideas that may be raised.

7 Developing an action plan – step seven

The action plan is usually developed by the area administrative body or area planning ad hoc committee in a meeting that occurs outside of the usual area meeting. These trusted servants set time aside between meetings to develop the action plan.

This is the step preceding implementation. An action plan is created for each approach. In this phase, the administrative body (or ad hoc committee) identifies:

1. tasks that need to be done,
2. time frames for accomplishing the tasks,
3. trusted servants who are responsible for completing the tasks,
4. resources that are needed, and
5. a completion date.

The trusted servants on the ASC's administrative body are usually asked to complete this step because they, in particular the chairperson, represent the single point of accountability for the area service committee.

Remember...

An action plan helps members remain focused on the goal, on the approach, and on the completion date; in short, it is easier for members to be accountable. Everyone involved knows what needs to be done, who is doing the work, and when to anticipate each step's completion.

Communicating progress at each area meeting helps in monitoring the process. Even though a plan covers the year ahead, we do not want each step to take a year. Also, communication helps with troubleshooting—an area may see obstacles and be able to resolve them through discussion as they arise. For example, resources, human or financial, may not be adequate to complete an action step. Providing the area body with this information and discussing solutions guide members to make the necessary adjustments.

Maintaining the plan

Implementing and monitoring the plan

With the planning process completed and the area's plans and goals approved, the area body is ready to put the plan into action—goals, approaches, and action plans.

Goals and plans are usually given to area subcommittees for completion. For example, if a goal involves contacting community medical professionals, more than likely that goal and action plan would be forwarded to the public information committee. In areas where no specific

subcommittee structure exists, the area committee may create workgroups or ad hoc committees to complete the task. Each workgroup needs a clear purpose to help the area achieve its goals. However, not every goal requires a workgroup or permanent subcommittee.

Work plans

Once the goals with the action plans have been delegated to committees and workgroups, the members of these groups create their work plans. A work plan is more specific than an action plan. Members within each committee or workgroup accept responsibility for certain aspects of the action plan.

Work plans consider human and financial resources. Will it take a member sixteen hours to complete a task, or sixty hours? How much money will it take, and when will money most likely be needed? These two resource areas are included in a progress report to the area.

A work plan will also be more specific with time frames. If thirty-day milestones have been projected in an action plan, a work plan may show forty-five days to reach identified points because the committee members have identified more details and challenges than were considered when the action plan was developed.

Record keeping and reporting

Accurate record keeping and reporting can help an area improve its annual planning process. A committee reports its progress to the ASC on a regular basis, usually at every service meeting. This information captures an accurate picture of the time and money that are involved in accomplishing any area goal, and helps set the stage for more realistic planning in subsequent planning cycles.

Planning cycle

Each year an area committee should update its plan using the following steps:

- ◆ Review plan from last year and assess progress and remaining priorities
- ◆ Gather new information on members' needs, area's operational performance, etc.
- ◆ Review longer (two- to three-year) goals and establish new priorities and approaches for the upcoming year

Ideally, the decisions that an area committee makes during its planning process drive the focus of the work and use of area resources for the upcoming year. As a result, an area may consider setting its annual planning session as follows:

- ◆ as soon as the new ASC administrative body is elected
- ◆ prior to the development of the area budget
- ◆ prior to the development of goals from area subcommittees

Adaptations

Each area will need to determine how many meetings it needs to accomplish the planning process. We identified steps based on the notion that an area meets monthly, and this planning would be in addition to the business meeting. For example, if an area usually meets for two hours, they may choose to add a couple of hours to each business meeting over a

two- to three-month period. Other areas may choose to shorten their business meetings or to have the planning meeting separate from the area meeting and devote a full day to planning. Once the initial plan is created and approved by the area service committee, yearly updates should only take an hour or two.

Time frames are contingent upon the size of an area and the number of members involved in the planning. Of course, regions and zones may opt to meet over a weekend and target one full day for planning. This is fluid and flexible. Remember, as our Basic Text tells us, “If it’s not practical, it’s not spiritual.”

Area planning outline

All members of a service body bear substantial responsibility for that body’s decisions and should be allowed to fully participate in its decision-making processes.

Seventh Concept

I. Purposes and benefits of planning

- ◆ Improve efforts to fulfill NA’s primary purpose
- ◆ Involve diverse member interests and perspectives
- ◆ Build stronger consensus
- ◆ Provide clear priorities for use of resources
- ◆ Achieve greater consistency in direction over the short and long term
- ◆ Improve accountability for attaining goals

II. Preparing to plan

- ◆ Who should be involved
 - GSRs
 - area administrative body
 - committee chairs
 - interested area members
- ◆ Logistics for planning session
 - identify specific time for planning sessions
 - allow adequate time for information to be passed to members and groups
 - identify facility to meet planning needs
 - create productive environment for planning sessions

III. The seven planning steps

- ◆ Step one: Gathering information
 - types of information to be gathered
 - ❖ the needs and challenges of members and local groups
 - ❖ the effectiveness of current area services, activities, procedures, subcommittees, and operations
 - ❖ the quality of relationships with the public/community including perceptions of NA and the local area service structure
 - tools to help gather information
 - ❖ sample area inventory tool that follows this outline
 - ❖ area planning tool A: sample group questionnaire
 - ❖ area planning tool B: sample questionnaire for evaluating issues in the community
 - ❖ consensus of points raised during an area service meeting
 - review information gathered and issues to be addressed
 - ❖ distribute information and planning session agenda prior to planning meeting
 - ❖ review NAVS Vision Statement and purpose for an area service committee
- ◆ Step two: Listing the issues
 - discuss information gathered
 - develop categorized, prioritized list of issues
- ◆ Step three: Developing goals
 - define what makes a good goal (including the fact that goals can take more than a year to reach); provide examples
 - create goals for each key area (service and/or operational)
- ◆ Step four: Prioritizing goals
 - discuss importance of prioritizing – area’s human and financial support
 - decide method for prioritizing goals
 - set priorities
- ◆ Step five: Creating approaches
 - define what makes a good approach; provide examples
 - integrate current area services and activities with new ideas
 - develop approaches for each goal (begin with priority goals)
- ◆ Step six: Prioritizing approaches
 - discuss importance of approaches and need to prioritize these
 - set priorities
- ◆ Step seven: Developing an action plan
 - explain the need for these plans
 - reach agreement as to who develops
 - develop an action plan

IV. Implementing and monitoring the plan

- ◆ Implementing the plan
 - use the area subcommittees (or workgroups) to effectively implement the plan
 - develop committee tasks and work plans, keeping in mind ASC budget and human resources
- ◆ Monitoring the plan
 - schedule committee reporting to ASC — how often and for what purpose
 - use area meetings to discuss progress and address issues
 - keep groups and members informed
 - develop ways to consider new area ideas once the plan is developed and adopted

V. Planning cycle

- ◆ Annual review of adopted plan
 - assess progress with goals and plan
 - gather new information from members
 - review multiyear goals — update approaches
- ◆ Scheduling the planning session
 - upon election of the new ASC body
 - prior to the development of the area budget and subcommittee goals

AREA INVENTORY

An area may want to send this inventory or a similar set of questions to the groups. Members or groups can answer each question with a number from one to five, using a scale such as:

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

When the numbers are totaled for each question, the area can see what most needs improvement (1) and what is going quite well already (5).

How well has the area served local groups this year?

- How well does the area communicate with local groups? _____
- How well does the area respond to the needs of local groups? _____
- How well is the area managing its donations and area treasury? _____
- How effectively does the area demonstrate responsibility and accountability? _____
- How fully does the area train and support members who serve on the area service committee? _____
- How well does the area service committee foster an atmosphere of courtesy and mutual respect? _____
- How completely does the area provide opportunities for communication about committee concerns to the local members and groups? _____
- How well is a sense of unity fostered within the area service body? _____
- How positively is a sense of unity shown within local groups? _____
- What is the area's experience with trusted servants? _____
- How well has the area fostered the willingness of the local fellowship to volunteer for service positions? _____
- How well does the area practice continuity and rotation? _____
- How well does the area function in maintaining a full complement of trusted servants, with no open commitments? _____
- How fully does the area create an environment where the conscience of the body guides the decisions and direction of the area? _____

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

- How well is the area communicating with those in the community who interact with addicts? _____

- How completely does the area respond to the needs of the larger community? _____

- How well is the area using human and financial resources to carry NA's message of recovery in an efficient and effective way? _____
- How fully trained and supported are the trusted servants who interact with members of the community? _____
- How well has the area built cooperative relationships with those in the larger community? _____
- How easily can those in the larger community reach an NA member who is in a position to respond to their questions or requests? _____

How well has the area cooperated and collaborated with the region and NA World Services this year?

- How effectively does the area communicate with the region and with NA World Services? _____
- How well does the area respond to requests from the region and from NA World Services? How fully does the area share its needs and concerns with the region and NA World Services? _____
- How reliably does the area forward funds to the region and/or NA World Services?____

- How effectively does the area use resources (such as written materials or experience from other trusted servants) that are available through the region and/or NA World Services? _____
- How fully has the area formed a cooperative relationship with the region and NA World Services? _____
- How well is the area creating a sense of unity with the region and NA World Services?

Is there any particular area of service and/or area function that you perceive is outstanding?
Please identify: _____

Is there any particular area of service and/or area function that you perceive would need improvement? Please identify: _____

SAMPLE PLANNING SESSION AGENDA

Focus on task

20 minutes

- Review planning session purpose, format, and anticipated outcomes.
- Review NA Vision Statement, ASC purpose statement, traditions, and concepts.
- Briefly discuss the future of the area and the effect the area can have on the members, groups, and community at large.

Develop issues

45 minutes

- Review, clarify, and discuss the information from the area inventory.
- Create broad categories—list issues.

Set goals

45 minutes

- Set goals for each issue identified.
- Prioritize goals.

Develop approaches

45 minutes

- For each goal, review and evaluate current area services and activities.
- Brainstorm new items.
- Create and write down approaches for each goal.
- Prioritize strategies under each goal.

Take next steps

30 minutes

- Discuss what steps need to be taken to document information and approve the area plan.
- Identify next steps to: 1) prepare for plan implementation, including determining subcommittees and workgroups needed, 2) assign goals to subcommittees and workgroups, and 3) develop work plans.

As the title of this page indicates, this is simply a *sample* agenda, and the times next to each step are approximate. The amount of time for each step will vary with the number of members involved in the planning process, the depth of the information gathered from the area inventory, and the number of issues that are identified.

As we mentioned earlier in this document, these tasks may need to be carried out over two area meetings, and in some instances the area planning sessions may need to be extended to three sessions.

Regardless, we suggest that breaks—opportunities for members to stand, use the bathroom, get something to drink, etc.—be built into the process. A twenty-minute break for every 90 to 120 minutes of work is a good guideline.

ANOTHER OPTION FOR STEP TWO LISTING ISSUES:

1. Everyone gets three 5x8 cards and a marker; they are asked to write one issue per card
2. The facilitator asks randomly for the first card; the card is placed on the wall.
3. Other “like-minded” cards are also placed on the wall in a vertical line.
4. Cards will have varying levels of detail; the facilitator identifies one of the cards as the title card for that list, and also creates a sort of outline from the other cards based on subtopic and level of detail.
5. Some cards may need to move to a new category, as the group deems necessary; others may need to be put into a parking lot.
6. This process continues until all cards are on the wall. The result is five to eight general topics with various subtopic and detail cards below.
7. Participants are asked to prioritize the category title cards using dots; the result is a prioritized list of issues (title cards) along with supportive outline.

GOAL-SETTING WORKSHEET

Broad category: Training and mentoring		
Issue	Goal	Priority Rating
<i>Lack of informed GSRs</i>	Regularly scheduled & innovative learning days	
Broad category: Relationships with the community		
Issue	Goal	Priority Rating
<i>Meetings being asked to leave facilities</i>	Strong relationships with local meeting facilities	

GOAL AND APPROACHES (STEPS) TO REACH GOAL

GOAL: Strong relationships with local meeting facilities

Existing area practices, services, activities related to the goal	Overall Priority Ranking
1. Pay rent and check in with facility manager	
New ideas (approaches/strategies)	
1. Create open exchange with facility manager	
2. Invite facility representatives to attend open NA meeting	

Make additional copies as needed