

Memorandum

To: World Service Conference participants
From: World Services Inventory Composite Group
Date: Friday 6 August 1993
Re.: progress report

The World Services Inventory Composite Group held its first meeting 24-27 June 1993 at the WSO in Los Angeles. Among the many items on its agenda, the group had three key tasks:

1. To begin to work together as a service body
2. Development of surveys for the fellowship to use in evaluating world services
3. Compilation of tools for world service boards and committees to use in assessing their own operations at a world services meeting to be held later in the conference year

Composite Group members attending this first meeting were Rogan Allen (WSC Outreach Ad Hoc Committee), Jeff Baker (Indiana RSR), Susan Blaue (WSC PI Committee), Mandy Fraley (WSC H&I Committee), John Halverson (WSC Policy Committee), Leah Harris (Chesapeake-Potomac RSR), Jane Nickels (WSC Literature Committee), Tom Rush (WSO board), Jamie Scott-Hopkins (Trustee), Bob Smith (Trustee), and Paul Tanner (Spain RSR). Support Team liaison Ron Sheppeard (WSC treasurer) sent his regrets, informing the group he could not attend for medical reasons. Also attending were consultants Barbara O'Hearne and Karen Carter and WSO Inventory Team members Stephan Lantos, Lee Manchester, and Marilyn Scott.

GETTING STARTED

Among the Composite Group's first concerns were its communications with the fellowship. A full report will be made to conference participants after each group meeting; a shortened version will be prepared for broader distribution within the fellowship. In addition, sixty pages of extensive staff notes of the Composite Group's June discussions are available upon request to anyone interested in them. The group's next report will be issued after its meeting in September 1993.

The Composite Group assigned its members responsibilities as liaisons to each world service board and committee. The group discussed the idea of also assigning each of its members the responsibility to serve as fellowship contact for a certain territory or bloc of regions, but made no definite assignments at its June meeting.

At a brief meeting held immediately after the closing of WSC'93, the Composite Group had decided to rotate its leadership through the group membership. At the June meeting, the group confirmed that early decision and specified that it would choose a new rotating leader at each meeting to serve through the following meeting. The Composite Group rotating leader will chair group meetings, approve correspondence, serve as the focal point for the group's internal communications, and interact on behalf of the group with the inventory Support Team, the Interim Committee, and any consultants contracted to work with the group. However, the group made it clear that it expected its rotating leaders to delegate responsibility to other committee members as much as possible so as not to become overburdened.

In setting up its leadership in this way, the Composite Group has made a deliberate departure from leadership patterns it has seen elsewhere in NA service in general and world services in particular. Those patterns are perceived as placing an inordinate burden on committee chairpersons and cutting the ordinary committee membership out of the information-and-decision loop between meetings. The group is aware that rotating its members through the leader's position so frequently may create problems with leadership continuity. However, the potential benefits to be gained for the group and the project from the arrangement are seen as being so significant that the Composite Group feels it's worth at least a try. The group will reexamine the arrangement at future meetings and will drop it if it doesn't work.

The Composite Group confirmed Rogan Allen, tentatively chosen for the group's leadership position at its brief post-conference meeting, as leader for the June meeting. Leah Harris was selected to lead the group through its September meeting.

Early in the June meeting the Composite Group discussed a paper on the inventory process that the Support Team had asked one of its members to prepare. The paper challenged the use of outside consultants on the inventory project, suggesting that we could do everything that needed to be done with WSO staff and fellowship volunteers. In the course of its discussion, however, the Composite Group came to the conclusion that expert help may be required throughout the inventory on many technical matters such as survey development and analysis. Furthermore, upon examining the plan approved by the WSC this April, the group concluded that the plan authorizes the use of a consultant in the development of information-gathering tools for the inventory.

World Service Office employees assigned to staff the inventory project are Stephan Lantos, Lee Manchester, and Marilyn Scott. Steve was brought in as project administrator after the WSO board asked its executive director, the previous project administrator, to resign. Lee, senior editor for the WSO, had been assigned particularly to help ensure clear, complete communication between the fellowship and those working on the inventory. Marilyn Scott, a member of the WSO Publishing Team with Stephan and Lee, was asked to join the inventory project as support staff. The Composite Group expressed its confidence in these special workers, recommending

that the WSO maintain its assignments to the inventory project. The Composite Group specifically instructed Lee to prepare the group's reports for its approval.

The Composite Group talked about the ways committees work and various negative work patterns group members would like to avoid in their involvement with the inventory project. Group members expressed their intention to take basic steps to take care of themselves during the meeting, ensuring that regular breaks and adequate time for lunch and dinner would be built into the meeting schedule and refusing to work late into the night. Group members also decided to hold NA recovery meetings for themselves at their hotel at the end of each day. These meetings would make it possible for the group stay centered and focused on its purpose, and also provide a way for group members who had never worked together before to open up to one another on a personal level. Ironically the group succeeded in holding to these intentions only for the first day of its three-and-a-half-day June meeting; members say they hope to be able to put these resolves more fully into practice at future meetings.

With these preliminaries resolved, the Composite Group was ready to begin work on the major tasks on its schedule for the weekend: developing surveys for groups, ASCs, and RSCs to use in assessing the effectiveness of NA world services; designing self-assessment tools for the various world service boards and committees to use at the sole WSC "quarterly" workshop planned for this conference year; and evaluating the overall inventory program itself. The Composite Group focused first on the survey development task because the approved inventory plan called for the surveys to be translated and mailed in July 1993, while the self-assessment tools were not to be used until October at the earliest. The group did not engage fully in discussion of the viability of the overall plan until later in the weekend.

SURVEY DEVELOPMENT

The process of developing drafts of the surveys to be used by groups, areas, and regions to inventory NA world services was very thorough. Two consultants led the Composite Group through the process, at each point identifying decisions the group had to make before it could proceed further. They started by explaining the five steps of the research process:

1. Define problem and research objectives
2. Develop information source
3. Collect information
4. Analyze information
5. Present the findings

To define the problem, the consultants led the Composite Group through a "brief history" exercise. What had led to the call for an inventory of NA world services? What was the inventory's purpose? The answers to these questions would shape the

entire survey process, the consultants told the group, so it was important for Composite Group members to discuss these questions thoroughly before proceeding.

Two themes surfaced from the group's discussions, one practical and one spiritual. Practically speaking, Narcotics Anonymous had experienced extraordinarily rapid growth over the last decade, leading to ever greater fellowship demands on NA world services. However, some members believed the world service system may have become too unwieldy to respond well to such demands. Finally, complaints of overwork and overspending led to cries for a service slowdown which in turn led to a call for an overall operational audit. World services needed an inventory that would help it identify possible operational inefficiencies, systemic inadequacies, and unmet fellowship needs as the basis for a long-range strategic planning and retooling process.

Composite Group members also talked about the spiritual rifts that had divided pockets of the fellowship from NA world services. In these pockets, the fellowship's "minority voice" had long expressed interest in a world services inventory that could serve as an equitable foundation for recrafting the service system. Some members of the group found it ironic that the inventory had not been put on the WSC agenda until world-level trusted servants had overloaded themselves with responsibilities. Even so, these members expressed their support for the initiation of the inventory project, sharing their hope that it would begin the process of healing any breaks between the fellowship and its world services.

The process of defining research objectives was somewhat simpler. What kind of research was the Composite Group doing in this phase of the inventory: *exploratory, descriptive, or causal*? Was the fellowship survey supposed to explore preliminary data that would throw light on a problem and help develop hypotheses for future survey verification? Was it supposed to describe certain phenomena within the fellowship and world services? Or was it meant to identify causal relationships in the interaction between the NA Fellowship and NA world services--when *this* occurs, *that* results? The Composite Group decided that the survey should serve to fulfill a combination of these research objectives, focusing more on the descriptive but also exploring some existing conditions and, in a few cases, seeking to identify whether certain conditions or actions cause other effects.

Certain aspects of the world services inventory research process had already been defined by either the WSC-approved plan, the nature of the inventory, or the nature of the NA Fellowship. The plan called for a survey to be used in gathering information rather than observation or experiments. Questionnaires rather than mechanical measuring tools were more appropriate to the inventory process as information-gathering instruments. And the "sampling unit," the portion of NA to be surveyed in examining the relationship between world services and the fellowship, was determined by both the plan and the need for total inclusiveness in this project: The entire fellowship, every group and ASC and RSC, would be surveyed.

The consultants pointed out various survey contact methods to the Composite Group, including telephone, mail, facsimile machines, computer connections, and personal contact. With more than ten thousand NA groups with current addresses logged in the WSO database and more than five hundred area committees, the Composite Group concluded that the mails would provide the only realistic means of administering the inventory survey to the fellowship. Letters will be sent to regional and area committees a few weeks before the surveys are mailed, encouraging the entire fellowship to prepare itself to take part in the survey. Shortly after the surveys are mailed out, a round of reminders will be sent to reinforce the importance of survey participation. Self-addressed envelopes will be included with all surveys to make returning the forms as simple as possible. Return envelopes for responses from the USA will be marked postage-paid for even greater ease in response; unfortunately, it is not financially feasible to mark returns from countries other than the USA postage-paid.

The consultants asked the Composite Group whether it wanted to use open-ended questions, closed-ended questions, or some combination of the two in the fellowship survey. They explained that open-ended questions are less structured, calling upon the respondent to fill in a blank, complete a sentence, story, or picture, or finish a word-relation query. A closed-ended question, on the other hand, gives the respondent a very limited, very specific set of choices in answering--a yes-no or true-false dichotomy, a multiple choice, or some kind of rating scale. The Composite Group chose to make all questions in the survey closed-ended ones, making it possible to inexpensively tabulate large numbers of responses in a variety of languages. Most questions were framed to accommodate the Likert response scale, asking the respondent to say to what extent she or he disagrees or agrees with a particular positive statement. The consultants told the Composite Group that respondents would probably find it easier to understand the survey if most of the questions used the same kind of response scale, and recommended the Likert scale as being one of the most useful.

The consultants asked the Composite Group to consider gathering an array of demographic data about the NA Fellowship's members as part of the inventory survey. This would make it possible not only to give those outside Narcotics Anonymous much more detailed information about our fellowship, they said, but would also help in cross-referencing survey responses, helping the Composite Group get the most information possible out of the exercise. The group, however, decided against asking for demographic data in the inventory survey, knowing how strongly certain segments of the fellowship feel about requests for such data. The only cross-correlation data to be gathered with the survey will be for location, telling the Composite Group how many survey responses have come back from the various geographic districts to which survey blanks were originally sent.

The final matter to resolve before developing the questions themselves was, who will answer the questionnaire? When a questionnaire is sent out to an NA group, for

instance, will the Composite Group expect the GSR to fill it out on the group's behalf, using his or her own best judgment? Or should each survey response show the number of group members who agreed with each option for each question? Or should the responses show a single answer to each question, reflecting the views of each group-as-a-whole? The consultants told the Composite Group that it is important that all respondents answer in the same way; if they don't, the survey results will be skewed. The Composite Group decided to ask that the survey responses reflect the group conscience of whatever body is being surveyed. The RSC survey should reflect the response of the regional committee, not a tally of all its members or the response of the RSR alone. Similarly, the ASC survey should reflect the conscience of the area committee, and the group survey should register the group's collective conscience. Instructions to be included in the cover letter to each survey will make this clear to the respondents. Members responding to the survey who have more input than just their survey responses will be encouraged to write out their remarks on separate pieces of paper to ensure their notes are given attention.

With this foundation established, the Composite Group was ready to begin building the group, area, and regional surveys themselves. First, the Composite Group established the categories of inquiry for the surveys--the kinds of issues the group would be asking the fellowship to consider in evaluating NA world services. The basic categories were drawn from two sources. Four categories were drawn from page 11 of the *Temporary Working Guide to our Service Structure*: "The basic purposes of our world services are *communication, coordination, information, and guidance*." Three more had been identified at the February 1993 world services leadership meeting that developed the original administrative plan for the inventory project: *perceptions, expectations, and service delivery*. After these categories were fleshed out a little, the Composite Group ranked them in order of importance. Based on that ranking, each category was allotted a certain number of questions. The Composite Group divided into three teams to develop rough questions for each survey. Once completed, those questions were brought back and read to the whole group for feedback. Given that input, the consultants went to work with staff to clarify imprecise language, simplify complex wording, and standardize the response formats used in each question to facilitate easy response. This same process was used to produce the first drafts of all three questionnaires: group, ASC, and RSC.

At the end of the weekend the Composite Group established a program for refining the survey drafts by mail. Once the drafts are finished, group members will use them to administer a small number of trial surveys in their home areas in August and September 1993 to help ensure that the questionnaires are understandable and useful. Most of the trials will be administered in English; one round of trials will be run in Spanish to test the translatability of the questionnaires. The questionnaires will then be revised as needed and finalized at the September Composite Group meeting. The

finished surveys will be translated from English into French, German, Portuguese, and Spanish. In October, they will be mailed out to the fellowship. The returns will be ready for tabulation and analysis in January 1994. The Composite Group will evaluate them at its scheduled meeting in February 1994, and will deliver a complete report on the surveys in particular and the inventory in general at WSC'94 in Atlanta.

FURTHER USE OF CONSULTANTS; DEVELOPMENT OF SELF-ASSESSMENT TOOLS

Once progress toward completing first drafts of the surveys was well under way, the Composite Group turned its attention to considering whether it wished to make further use of the consultants contracted to help the group at its June 1993 meeting. To engage fully in that discussion, the group had to begin looking at the inventory administrative plan as a whole and consider its viability. The plan is very ambitious, calling for an enormous amount of work to be done in very little time. Barbara O'Hearne, the leading consultant, presented a program for completing the plan, but the consulting costs involved were substantial.

The Composite Group was overwhelmed by the enormity of the task facing it and the estimated costs for consulting assistance. Some group members suggested that the inventory plan, as originally approved, simply couldn't be accomplished and that it would not be prudent to rush into a decision about consultant spending when the group lacks confidence in the plan. It was time to pause, these members said, and redesign the inventory administrative plan before going any further. Other members said that the next step should be to get a second consulting quote based on the O'Hearne plan. Still other members said that, without a clearer idea of what certain elements of the inventory project were meant to produce, no consultant could give such a second quote.

Though this fundamental uncertainty was not resolved, the Composite Group realized it had to make some decisions about future work on the inventory project. The group identified three task areas it intended to complete in CY 1993-94:

1. Questionnaire development; field test; full run; data entry; analysis and reporting
2. World service board and committee self-assessment tool development; training of Composite Group members to administer at self-assessments at the quarterly; self-assessment analysis and reporting
3. Development of self-assessment tools for the World Service Conference itself and planning for WSC'94 as a total inventory event

The Composite Group affirmed its belief in the value of qualified outside consultants to assist with certain technical responsibilities. The group also recognized the importance of skilled facilitators in helping meetings run smoothly and effectively. Composite Group members expressed appreciation for Barbara O'Hearne and Karen Carter's

ability to lead the group through the questionnaire development process and made a decision to use them throughout the administration of fellowship inventory surveys. However, the group did not believe it necessarily had to use outside consultants for every phase of the inventory project, especially given consulting costs, and left its options open concerning further use of either Mmes. O'Hearne and Carter or other consultants for help with other aspects of the plan. The group also stated its desire to find someone else to help facilitate future Composite Group meetings. The group decided that it would start its September meeting by finishing the surveys; then it would begin preparing board and committee self-assessment tools in-group with facilitator assistance.

One sticking point in preparing for development of self-assessment tools was the identification of evaluative standards against which to measure board or committee performance. The consultants believed that either they or members of the Composite Group should take steps to discover established evaluative standards in approved board and committee guidelines, handbooks, and the TWGSS. The Composite Group felt by-and-large, however, that such an evaluation would only determine whether the boards and committees were living up to their guidelines. The group was more inclined to put its time and energy into developing self-assessment tools that would help boards and committees measure themselves against a standard of usefulness to the fellowship and NA's primary purpose, not just against official guidelines.

The Composite Group received input suggesting that board and committee self-assessment tools include guidance on how individual members of those bodies can inventory their personal involvement in the work of those bodies. The Composite Group decided against including such material in the self-assessment tools, stating that it was up to individual members to determine whether or not they needed to inventory their personal involvement in service, just as it was up to groups, areas, and regions to inventory their own affairs. One Composite Group member did describe how she had used the questions in the NA informational pamphlet *Living the Program* to examine her personal service activity to some benefit. The group was intrigued by this approach and recommended that others give it a try if they felt so inclined.

UNRESOLVED PROBLEMS

A number of problems with the WSC-approved inventory administrative plan were identified by the Composite Group. The group will examine these problems further at future meetings and welcomes your suggestions on how to deal with them.

Define "comprehensive histories"

The WSC-approved inventory plan calls for World Service Office staff to prepare "comprehensive histories" of each world service board and committee as background for the self-assessment process. The question is, *how* comprehensive? Before asking

staff to spend substantial amounts of time digesting tons of ancient paperwork, the Composite Group realized it should develop a better idea of what the self-assessment tools will look like so that relevant histories can be put together especially to complement those tools. The consultants went so far as to question the whole idea of preparing comprehensive histories, encouraging the Composite Group to develop assessment tools that evaluate where world services are now and what needs to be changed to make them more effective in the future. Getting bogged down in examination of the past, the consultants felt, would not help Narcotics Anonymous move forward in fulfilling its primary purpose more effectively. The only direction at this point from the Composite Group is that WSO staff gather all relevant files, catalogue them, and make those catalogues available to the respective boards and committees for future use.

Follow-up survey

The inventory plan calls for a survey to be administered this year to provide the fellowship with means of evaluating world services. The plan calls for identical surveys to be administered early next conference year as a way of verifying the data gathered in the first round. The Composite Group and its survey consultants question the value of this confirming round, suggesting instead that a second round of surveys be used to hone in on any problem areas that may be identified in the first round.

Developing recommendations based on inventory findings

The inventory plan calls for "detailed proposals [to be] developed [in late 1994] that will go into the annual *Conference Agenda Report* for consideration at WSC'95." The Composite Group was not sure exactly who would be expected to prepare those proposals; the WSC'93-approved plan did not specify whose responsibility the task would be, and the group was not prepared to make any assumptions about the matter.

Systems consultant

The Composite Group expressed some concern that the inventory plan calls for the introduction of a systems consultant into the project next May before the local fellowship forums have been conducted to gather direct personal input on world services. The systems consultant is to make a professional outside evaluation of the inventory data. Without the information that will be gathered in the fellowship forums, the Composite Group feels, the systems consultant will be working from an incomplete data base. The group did not decide whether to reschedule the local forums or the introduction of the systems consultant into the process; clearly, however, one or the other change would have to be made before long.

FUTURE COMPOSITE GROUP ACTIVITIES, MEETINGS

The Composite Group will have a conference call on Sunday 25 July to resolve issues related to preparation of survey test materials and the agenda for self-assessment programming in September.

The next meeting of the Composite Group will be held 16-18 September 1993 in Atlanta, Georgia, USA. All group members, all inventory staff members, one inventory Support Team liaison, and one consultant are to attend. The group hopes to finish the fellowship surveys and make substantial progress toward completing world service board and committee self-assessment tools for use later in the conference year at an all-world-services meeting. The Composite Group meeting will be open to observers. However, no open forums or other types of structured interaction with the NA community in the Atlanta area will be scheduled so that the fellowship in that part of the US does not have a greater opportunity to impact the inventory project than other NA communities will have.

The Composite Group believes it may need to ask for an additional meeting in November 1993 to complete self-assessment materials for the world service meeting and begin preparing the WSC'94 program. The group will not know whether such a meeting will be necessary until after the September meeting is concluded.

The date and location for the world services meeting during which all boards and committees will assess their own performance have not yet been determined. It had originally been hoped that this meeting could be held in October 1993, perhaps in Phoenix, Arizona, USA, or in December 1993. However, until the Composite Group has a much better idea of how long it will take to complete the self-assessment tools that will be used as the core of the agenda for that world services meeting, the group is unwilling to make a scheduling recommendation. Right now, the only certainty is that the meeting will not be held in October. The Composite Group is aware that the uncertainty and delay are frustrating for many world service participants. The group encourages you to be patient and asks for your understanding.

The final Composite Group meeting of the 1993-94 conference year called for by the inventory plan is scheduled for February 1994. That meeting is to be used to evaluate inventory information received thus far, prepare reports, and make final logistical preparations for WSC'94 in Atlanta.

This concludes the Composite Group's July 1993 report of progress made on the world services inventory project. It is the second report to World Service Conference participants on the inventory project. The first, dated 9 June 1993, came from the inventory Support Team. If you wish to receive a copy of that report, or if you have any questions or ideas about the inventory, write to **World Services Inventory, Box 9999, Van Nuys CA 91409 USA** or telephone **(818) 780-3951**.