

JUNE 2020 DELEGATE'S REPORT

The historical moment of attending the virtual World Service Conference as your Delegate is extended to you as we gather at our June Iowa Area Assembly. Welcome to each of you and thank you for taking the time to create a space to participate. Normally we would greet and hug each of you and be able to answer questions about the nuances of Assembly. Please feel free to reach out to any of the AWSC members via email about their reports. Your District Representative has contact information for each of the AWSC members. We are here and available for you.

Dreaming Big with 20/20 Vision

Beginning with the theme for the 60th World Service Conference, Dreaming Big with 20/20 Vision, I have watched our Higher Power planning ahead in love for our program of recovery helping us to respond to the sudden change in so many of our plans. Conference discussion themes, planned long in advance, revolved around including virtual components to enhance the way we interact with the families and friends of alcoholics. The leitmotif continued with ideas of inventorying where change might aid our service structure and looking at how fear stops us from moving forward. Last year at the World Service Conference, the Mega-Issue discussed a time when a hybrid portion might be added to the physical conference. Little did we expect this dream to become a reality so quickly. Because of the virtual shift, we were able to respond to discussions with real time experience, strength and hope. The Conference Leadership Team worked tirelessly for a month to reduce, and reformat, the World Service Conference agenda to ensure that we met our legal obligations.

HYBRID CONFERENCE

Our hybrid conference began on Monday, April 20th, with a Thought Force and Work Group presentation. We used AFG Connects * to share our thoughts on Chosen Agenda Items (CAIs), Thought/Task Force and Workgroup topics which are noted below. Once the topic was released to the Conference, we had 24 hours to research, review and respond in 300 words or less.

*AFG Connects is a digital resource created by the WSO to aid discussion and disseminate information dedicated to the various branches of service. The DRs, Coordinators and Officers have access to information pertinent to their service position which they in turn share with members via reports and the Area Newsletter. A new thread was created for Conference this year and became my go to place for all documents and discussions concerning Conference.

Below are the topics the Conference focused on. I was able to respond to all of them. Many of them come with insightful presentations that we as

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members would find helpful in broadening our understanding of Al-Anon and its Legacies. 30 virtual minutes at this Assembly is not enough time to offer you a full report on the information gleaned at Conference. An interactive and informative afternoon workshop in Des Moines (my hometown) or in your District would allow us to explore these topics further.

- ❖ 4/20/20 Work Group - Electronic Meeting
- ❖ 4/20/20 Thought Force: Identify Ways to Look at Service in Relation to Roles, Terms, & Possible Roadblocks
- ❖ 4/22/20 Thought Force: Fear of Change
- ❖ 4/22/20 Chosen Agenda Item (CAI): How is Al-Anon going to reach new members in the 21st century and the millennial generation?
- ❖ 4/23/20 CAI: Our Envisioned Future sees Al Anon being a global organization with barrier-free access to the program, how do you see this manifesting?
- ❖ 4/23/20 Task Force: Reaching & Unifying Rural & Large Geographic Populations

Electronic Meeting Work Group (EMWG)

I want to highlight this presentation because of its relevance to our world today. The Work Group is comprised of members of the Board and WSO staff and was formed to look at the evolving relationship between the WSO and Electronic Meetings (EM), the challenges surrounding electronic meetings and how the statistics are changing.

While online meetings have been held for over 20 years, there is a definite upward trend happening. At the end of 2019 there were 252 registered electronic meetings - 106 online and 146 phone. Currently there are now over 300 electronic meetings - 180 phone meetings, 126 online meetings, including 7 Alateen Chat meetings.

WSO staff are supporting the electronic meetings through the registration process and with questions regarding the meetings. Currently they are unable to provide technical support- this may be ameliorated by the new AFG, Inc. mobile app which is hoped to provide a confidential online and phone meeting platform, as well as many other offerings. Pilot testing was slated to begin in May with an expected roll out in July.

Below is a timeframe outlining a deepening interaction between the WSO and the EM group CMAs.

- March 2015 – Annual Phone Meeting CMA conference calls begin
- November 2018 – Conference call with all Electronic Meetings CMAs

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- January 2019 – AFG Connects Electronic Meeting Community created
- April 2019 – Online and Phone Meeting CMA conference calls

The Electronic Meetings Community on AFG Connects allows the CMAs to interact with each other and share Experience, Strength, Hope. The Delegates have access to all communities on AFG Connects except this one. The EM Community is one example of a large region without borders which makes the inclusion into the service structure difficult. One goal of the EMWG is to make recommendations on how to incorporate electronic meetings into our service structure. This is an ongoing discussion. Perhaps real time experience will provide additional guidance.

The WSO holds quarterly conference calls with the Electronic Meeting CMAs to discuss topics like:

- Use of resources on al-anon.org to support the meeting.
- Use of the Traditions to resolve conflicts in meetings.
- Starting new meetings on new platforms.
- How to verify and update meeting information.
- Incorporating service.
- Safety.
- Sponsorship.

Three key components of the workgroup revolve around these topics which are relevant to Electronic Meetings, but also to our standard meetings.

Copyright Protecting our copyright, as discussed in Warranty 4 in the Al-Anon/Alateen Service Manual 2018-2021, version two (2), is a priority. An interim legal assistant was hired to help identify and ameliorate instances where the Al-Anon name and logo were being used by social media groups, websites or mobile apps which weren't linked to the service structure. A current example of the use of the Al-Anon name being used beyond the scope of copyright revolves around an online event called Al-Anon without Borders. Since the event is not linked through our service structure, meaning it does not have a GR, nor is it affiliated with a District or an Area to Al-Anon Family Groups the host was asked to refrain from using the Al-Anon name. Page 92 of the Al-Anon/Alateen Service Manual 2018-2021 version two (2) states that to avoid appearance of affiliation with an outside event, such events should not be promoted within our meetings. What flyers to share and what events to promote can be a complex issue and one worth holding a workshop and more discussion around. I am happy to have that discussion with you.

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One means of protecting the Al-Anon name lies in registering Electronic Meetings. Registered online meetings agree to sign the annual CAL reprint license, and have access to Electronic Newcomers welcome letter, which was recently rolled out to all members in May. *All members may now receive the welcome email letter by entering your email at al-anon.org/welcome.* The WSO recommends that we continue to remind members that electronic meetings are available, even after we return to f2f meetings. **To ensure members find a registered meeting always use al-anon.org rather than a search engine to find the meeting.**

7th Tradition - Many electronic meeting members would like to support the World Service Office in keeping with the 7th Tradition. Member donations are the second largest source of income for the WSO. Without a GR to act as the link of service between the District, Group and Area, Electronic Meetings may donate directly to the WSO via the website. Any group or individual member may donate by clicking the Contributions tab under the Al-Anon Store. Individual donations are tax deductible. All donors receive a receipt from the WSO.

We should be proud of how Iowa groups have used their wits to link group bank accounts to their temporary virtual meetings or offered their home addresses to receive contributions. Meetings that have formed temporarily are for the most part made of members we have come to know and love over the years and we feel a measure of safety providing our personal information. Imagine the fear that might surface if a newcomer to a virtual meeting was asked to send money to an anonymous members' home or a bank account that was noted in the chat. The challenges we are experiencing now offer us solutions to problems that we only dreamt about year ago.

CAL - Online groups do not have access to purchase hard copies or book sharing as we do at physical meetings. I loved the timeliness of the electronic release of Hope for Today! I instantly purchased a copy. Since its release, 1800 units have been downloaded which was 85% more than any other eBook that month. Audio versions of our books are also available for purchase. Visit al-anon.org and click on the Al-Anon Store tab. Under categories you will find tabs for AV/Audio and Electronic Literature. Purchases are made through outside vendors, but AFG, Inc. receives the normal share of profits. Literature sales is the primary source of revenue for AFG, Inc., as you will see further in my report.

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F2F or Electronic? Many of us enjoy the convenience of meeting virtually and many of us are longing to be back in our physical rooms. *If your meeting chooses to become permanently virtual, it will need to register as an Electronic meeting and will no longer have a Group Representative.* Adding a virtual component into face to face meetings as we transition presents potential problems with anonymity, confidentiality, privacy. Keeping the focus on our primary purpose of helping families and friends of alcoholics, the Traditions and remembering the newcomer when discussing if your meeting will link to members outside of the room, or other ways it will evolve, should aid your group in making an informed decision through the group conscience process. The WSO has issued some guidance on returning to physical meetings which will be posted on our iowa-al-anon.org website.

AL-ANON.ORG - The WSO website is always being updated to provide ease in finding information. A new Volunteer page was added which contains requirements and resumes for the Trustee positions. In 2019 a Member Blog was included with topics on 'Spiritual Principles', the Steps, Traditions and Concepts. Visit al-anon.org to add your experience, strength and hope to the blog. The Meeting Search function now lists more than 550 meetings occurring outside of the WSC Structure plus registered evolving and national service offices. See Meetings/Al-Anon Worldwide Contacts. Electronic and Phone meetings are also available here. Electronic searches can be tailored to your preferences and will be a go-to place for many of us that want to continue to participate in virtual meetings after we return to our home group meeting places.

VIRTUAL CONFERENCE – APRIL 21 & 22

The pinnacle of the Conference was our virtual meetings where we spent 4 hours each day reviewing the budget, audit and annual reports. Present were the Delegates, the Board of Trustees, the Executive Committee and the Chairperson for the ECRPM (Executive Committee for Real Property Management) – 92 altogether. The Budget, Audit and Annual Reports were sent ahead of time to allow for questions to be addressed prior to Conference and additional questions were fielded during the presentations. The Regional Committee on Trustees Selection Work Group gave a presentation on Out-of-Region Selection for Regional Committee on Trustees. The nominations for Trustee at Large, Regional Trustee and Board Officer/ECRPM were affirmed by the Conference on Wednesday and are listed in the April Chairperson of the Board letter which is now available. I'll

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bring more information about the Trustee selection and election process further in the year.

Motions were made and carried to affirm the 2019 Auditor's Report, 2019 Annual Report and the 2020 Finance Report which includes the budget. Conference members were able to attend the Board of Trustees meeting on Friday where legal affirmation was granted to the motions. It was especially gratifying to be present when Lynette K. was placed as Chairperson of the Board for AFG, Inc. Dreaming Big with 20/20 vision, Iowa invited her to be our speaker a year ago and thankfully our virtual reality allows her to join us as our speaker and workshop leader for our virtual Assembly.

Annual Audit

In January, an outside auditing firm is hired to review the previous year. Internal controls are tested and processes and procedures are observed. AFG, Inc. was issued an unmodified opinion which is the highest opinion given. The audited report includes our Statement of Financial Position at 12/31/19; a Statement of Activities including our revenue and expenses for the year; a Statement of Functional Expense including the expenses for the organization and a Statement of Cash Flow which includes the monies coming in and the monies flowing out.

General Fund					
Revenue		2019	2018	\$ Change	% Change
	Gross profit from literature sales	\$2,914,454	\$3,194,194	(\$279,740)	-9%
	Contributions	\$2,186,645	\$1,953,460	\$233,185	12%
	Noncash contributions	\$34,702	\$25,077	\$9,625	38%
	Investment income	\$57,627	(\$90,787)	\$148,414	-163%
	Forum subscriptions	\$274,853	\$257,685	\$17,168	7%
	Convention income (net)	\$0	\$217,358	(\$217,358)	-100%
		\$5,468,281	\$5,556,987	(\$88,706)	-2%
Expenses					
	Program services	\$3,021,604	\$2,731,010	\$290,594	11%
	Literature distribution services	\$838,661	\$859,503	(\$20,842)	-2%
	General administrative services	\$1,523,497	\$1,826,472	(\$302,975)	-17%
		\$5,383,762	\$5,416,985	(\$33,223)	-1%
	Change in net assets	\$84,519	\$140,002	\$55,483	40%

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Sources of Revenue

Literature = 54%

2019 sales \$3,704,652.

Down from \$3,975,492 in 2018 (reissue of anniversary ODAT)

Top Selling Books in 2019 by unit

- How Al-Anon Works 67,664
- Courage to Change 49,896
- One Day at a Time 28,156
- Hope for Today 18,338
- Paths to Recovery 17,146

Contributions = 40%

- Appeal \$637,679
- Bequest \$240,890
- Group \$795,288
- Individual \$194,220
- Memorial \$23,184
- Other \$282,699 (Bequests, Electronic Meetings, Undesignated)
- Birthday \$12,685

Forum = 5%

Investment Income = 1%

- Improved market conditions brought a gain of \$1,155,032.
- AFG, Inc. is invested in conservative, mature and healthy equities and bonds.
- Meets twice a year with fund managers at Merrill Lynch and Beck Mack & Oliver.
- The Reserve Fund balance as of 12/31/19 was \$5,753,920.

The Annual Report tells us that more than 67% of total expenses go directly towards achieving the Mission of Al-Anon Family Groups. Literature sales and Contributions alone do not support the work of the WSO. An annual transfer is made to the General Fund from the Reserve Fund twice a year. Excess funds are returned to the reserve fund at the end of the year. The Reserve Fund was established in 1970 by the Board of Trustees. Their objective is to have 12 months of operating expenses in the Reserve Fund. We are currently at 8 months. You will see that special monies were set aside for translation and the mobile app this year as part of the Strategic Initiative.

Expenses

Program Services include areas that fulfill the purpose of Al-Anon's mission

- Public Outreach- sharing the Al-Anon message at professional conferences
- AFG Records- maintaining and updating meeting locations
- International Services – supporting new and evolving international structures
- Group Services – registering new groups
- Literature – produces new exciting literature
- Conference – staffs and prepares the program for WSC
- Digital Strategy – maintains the website, enhances communication and develops PSAs (Public Service Announcements)

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Literature Distribution

- Publication
- Order Processing
- Designing and Publishing the Forum
- Shipping & Receiving
- Customer Service
- Processes Member Contributions

General Administration

- Maintains Operations
- Translation Services (Our goal is to be fully trilingual!)
- Balances Budget
- Maintain IT Function
- Oversees Administrative Functions
- Maintains and defends trademark and copyright

2019 Financial Overview

- We had a strong year for literature sales which has continued to trend up from \$3,415,145 in 2015 to \$3,704,652 in 2019.
- Contributions exceeded the budget due to two large member bequests (Budgeted for 2,050,000 - received \$2,186,645).
- Al-Anon Faces Alcoholism (AFA) went to year-round publishing.
- Resources are being allocated to tech and innovation.

Budget 2020

2020 Operating Budget				
		2020 Preliminary Budget	2019 Revised Budget	YTD Audited Actual
	Estimated Revenue			
	Literature Sales less cost of printing	\$2,900,000	\$2,850,000	\$2,914,454
	Contributions	\$2,000,000	\$2,050,000	\$2,186,645
	Magazine Sales	\$395,000	\$255,000	\$274,853
	Investment Income	\$55,000	\$36,000	\$57,627
	Reserve Fund Transfers	\$293,160	\$196,600	\$0
	Total Estimated Revenue	\$5,643,160	\$5,387,600	\$5,433,579
	Operating Expenses *	\$5,664,866	\$5,477,101	\$5,313,618
	Strategic Plan Initiative	\$68,160	46,527	
	Depreciation (Exc. Bldg.)	\$40,000	\$32,700	\$35,442
	Total Expenses	\$5,773,026	\$5,556,328	\$5,349,060
	Net Increase (Decrease) from Operations	(\$129,866)	(\$168,728)	\$84,519
	* a detailed list of expenses is available.			

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Revenues were expected to remain consistent with 2019. The July COB letter will provide a realistic picture after the recent downtrend in finances due to our physical isolation. Expenses are expected to increase in 2020 by \$129,866. Total Expenses are forecasted at \$5,773,026 and Revenue was projected to be \$5,643,160. The expense increase is due to the cost of French interpretation at the WSC, increased digital communication through PSAs and facilitation of the International General Services Meeting (IAGSM) in London in October.

Strategic Plan Initiatives for 2020 equal about 1% of the budget. Strategies are focused on:

- Launching the Mobile App in July (\$4,160)
 - The mobile app is expected to launch in July. It will include members only features such as access to electronic meetings, private messaging between members, a journal for gratitudes and thoughts, announcements from the WSO and a place to make contributions. Members will also be able to subscribe to premium content such as a daily member's sharing...more information to come!
- Continue simultaneous trilingual translation of literature and materials (\$10,000)
- Copyright and trademark protection (\$44,000)
 - Utilizing a paralegal to assist with finding and ameliorating copyright infringement.
- Competitive analysis as outlined by the WSO's Request for Proposal issued via In the Loop in May (\$10,000)

The World Service Conference was projected to be \$72,612. Final costs and reimbursements of equalized expense will be revisited due to the switch from the physical to virtual format. More information to come once it is available.

Groups – For Fun and for Free?

While no one is obligated to contribute to the basket, over time many of us find we are giving in correlation to the help and hope we receive from each meeting. \$1 in 1951 (the year Al-Anon began) is now worth \$9.86.

When budgeting for my group donations, I am especially mindful that I would not have been able to maintain my mental stability during the last two months without the daily support I received from Al-Anon meetings. I am back to work and am thankfully able to contribute to each of the meetings

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that I regularly attend in grateful correlation to the help and hope I received from each meeting.

Last term we had several presentations on financial abundance which encouraged us to frame our financial giving in terms of our spiritual principles of abundance, self-support, trust and responsibility. Continuing to review these ideas at our district meetings and in our groups reaffirms the balanced perspective Al-Anon offers to all areas of our lives.

Each group costs the WSO \$304.39 to maintain.

- CAL and Magazine editing (\$34.40)
- Volunteer Oversight (20.19)
- Public Outreach & Digital Strategy (72.66)
- Conference & Events (46.82)
- Group Services (87.36)
- Translation (18.88)
- International support (24.08)
- Translation (18.88)

Iowa Donations

There are currently 14,429 groups in the US and Canada.

Iowa has approximately 165 groups.

In 2019, 64.5 % of groups in Iowa donated to the WSO.

The average donation was \$138.14 per group in Iowa for a total of \$16,715.

An additional donation of \$4,725 was made from individuals, AIS', LDCs and Area meetings in Iowa.

If the average donation from Iowa groups is \$138.14 in WSO donations, that leaves a shortfall of \$166.25 for the cost of services allocated across all registered groups.

Many of you have seen the additional appeal letter issued by the WSO for additional donations. On May 14th, Cathy, Treasurer, AFG, Inc. wrote, "At the end of April, literature sales were down 75% and contributions were down 34% and we are projecting a \$1,600,000 operating deficit at the end of 2020. Given reduced revenues, the Board has approved a transfer from the Reserve Fund to the General Fund of \$250,000 to provide cash necessary for operations. Significant cost cutting measures have been implemented including elimination of Staff merit and cost of living increases for 2020; all Staff travel through the end of the year; and Board, Executive, and Finance Committee travel through the end of August. Additionally, after prayerful consideration of our projected cash position, Staff furlough and layoff actions were taken Friday, May 1.'

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We will receive financial updates in the July Chairperson of the Board letter. Until then, our generosity through additional contributions to the World Service Office will ensure that the staff and volunteers there are able to continue to offer the same consistent services until our meetings return to our physical locations. One suggestion is to send to the WSO the amount that it would have cost your group to send your GR to Assembly had we travelled to Storm Lake. Our spiritual principles of abundant thinking will continue to support our financial security. We are in good hands – our Higher Power is always planning ahead in love.

Our final two days were spent back at the Hybrid Conference. My panel met on Thursday evening to discuss Task Force: Reaching & Unifying Rural & Large Geographic Populations. This was a welcome substitute for the fellowship that I had anticipated having at a physical Conference. My panel met weekly for nearly all of the 8 weeks we've been on hiatus and I have been grateful to be a newbie among newbies! Friday we were able to attend the Board of Trustees meeting. A special highlight was hearing from outgoing Trustees. This is where the spiritual connection that comes from growing together in service really hit home for me.

Adventures are ahead for us! Not only will we see where our virtual reality takes us, but we also have opportunities to plan for fun weekends full of fellowship and information. In 2021, Al-Anon is celebrating 70 years of hope and recovery. 70 years is a milestone achievement for any organization. Iowa has a rich tradition of involvement in all levels of our service structure. We have so much to celebrate! How can our groups, districts and the Area commemorate this anniversary year? I look forward to seeing our imaginations creating a reality that reflects the wellness that our program is founded on.

Below are special events planned by the WSO that we can participate in.

Road Trip, You and Your Board Connect!

Saturday, October 31st Cleveland, OH

This event has been cancelled due to fiduciary and health concerns.

WSC 2021 & Al-Anon's 70th Anniversary

The 2021 World Service Conference from Monday, April 12, through Friday, April 16, 2021. Delegates are scheduled to arrive on Sunday, April 11, and depart on Saturday, April 17. The Conference will be held at the Westchester Marriott in Tarrytown, New York. All Conference members will visit Stepping Stones on Wednesday, April 14, 2021.

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Al-Anon will celebrate its **70th Anniversary with a banquet to be held on Saturday, April 17 from 7:00 - 10:00 pm** at the Westchester Marriott in Tarrytown, New York for our celebration. Tickets (price to be determined) will go on sale early next year and will be sold on a first come, first served basis (500 guests maximum). Anniversary attendees wishing to visit **Stepping Stones (Bill and Lois' historic home)** while in the area for the banquet must contact Stepping Stones to check availability for a Monday through Saturday 1:00 pm tour and make a reservation, as walk-in tour visits are not permitted.

Al-Anon International 2023!

Celebrate Al-Anon's Seventh International from June 29- July 2, 2023 in beautiful Albuquerque, New Mexico.

Attending an International is an opportunity to experience the worldwide fellowship of Al-Anon/Alateen in all its diversity, focused on our common unity. ***Albuquerque in 2023!!***

In closing, I want to thank you for taking the time to read this. When you are comfortable, I am ready to bring skits, workshops and presentations to you. I love growing in Al-Anon. Service continues to bring me greater awareness of my own spiritual compass. The Legacies provide me with invaluable insight and guidance which continue to bring me a life rich in hope, friendships and love.

I look forward to greeting each of you warmly in person at the Fall Assembly. Until then, let's keep Dreaming Big with 20/20 vision.

Katy P., Iowa Delegate / Panel 60 / iowadelegate@gmail.com