

Area 9 Florida-North Panel 61

Excess Funds Thought Force Final Report

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Thought Force Topic/Charge

We have a surplus of \$10k this year due to reduced expenses during COVID shutdowns. Historically, we have sent extra funds to help WSO with shortfalls. COVID may have affected our Area in ways that are not entirely clear. Are there risks to local groups and recovery in general? Are there opportunities to carry our message to others that may not have been available in the past?

Thought Force Summary/Findings

The Thought Force met twice since the Area World Service Committee meetings in January to discuss this topic. During the first meeting, we reviewed the Service Manual's description of how Thought Forces work and any references to how excess funds are used typically. We also reviewed the Knowledge-Based Decision Making (KBDM) documents in the Area Document Library, and recommendations the Panel 58 Area Treasurer collected and shared.

Most of the first meeting's discussion focused on other uses for excess funds beyond donating them to the World Service Office. No one on the Thought Force could recall a case where the Area used excess funds for anything other than an extra donation to the WSO. The Thought Force also checked with the Archives Coordinator to search for how any excess funds were used by previous panels. No references other than sending the funds to WSO were found.

We agreed both public outreach and Alateen could benefit from extra funding. Member support for public outreach varies wildly from District to District. Some have strong programs going on while others are struggling to find volunteers. Al-Anon public outreach can and often does include Alateen. We also agreed that Members in Area 9 like public outreach because they can see tangible results in their communities like billboards, local ads, or increased attendance at their meetings. Members may not realize how the WSO is "the glue that holds us together," supporting Al-Anon as a whole, or consider support from the WSO to be behind the scenes.

Another topic we considered was how the changing use of electronic meetings could increase costs for AWSC and Assembly meetings. Saving excess funds would prepare the Area for expenses that we are not aware of at this time.

We agreed that Area 9 Members have continued to be generous with contributions, even when the pandemic was at its worst. We also realized that having excess funds is not guaranteed every year, and we do not want to put undue pressure on Members, Groups, Districts, or event committees to generate more revenue from their events.

The Special Appeal Letter that shared the budget deficit the WSO is experiencing arrived between the first and second Thought Force meetings. We agreed the letter re-emphasized the need to first consider donating any excess funds to the WSO in the future.

During the second meeting, we discussed the need for a formal process to determine what to do with excess funds during the second meeting. Many Members would like to know what else was considered besides an extra donation to the WSO. Members may have ideas on ways to use excess funds but are unaware of how to share them with the Area. Now it seems like Members would need to be at the right place, at the right time, attending an Area Meeting, and be prepared with their ideas.

The discussion led to some questions for a Task Force to explore – Would creating a process or a committee be the best approach to determining what to do with any excess funds? Should both be created? How would each approach incorporate spiritual principles we considered such as trust, honesty, transparency, responsibility, and prudence? Having a process would encourage Members to use the Links of Service to share an idea and promote transparency within the Area. If District Representatives and District Information Services Liaisons were notified in advance that excess funds were going to be discussed before an Area meeting, they could ask their Groups for suggestions as they do for Red Light/Green Light topics now. Alternatively, we agreed that having a committee discuss ideas suggested by the Groups and Districts regardless if the Area had excess funds available to spend would encourage communication and keep the topic top of mind for Members serving at the Area level.

Thought Force Recommendation

The Thought Force on Excess Funds recommends the Area impanel a Task Force to consider the next steps on this topic. There is clear interest from the Membership in finding other ways to use excess funds within the Area, and no commonly known process on how to surface those ideas from the Area Membership at large. The Task Force could benefit from studying the results from the other Thought and Task Forces underway. For example, excess funds could support the increasing interest in allowing Members to attend Area meetings electronically.

The Task Force could consider if a process, committee, both, or some other solution would be best suited to enabling Members to bring forward ideas for how to use excess funds in the future. It could also consider how each approach would incorporate the Links of Service and our spiritual principles into any actions it recommends.