

The APT Process and our Action Plan

Steve facilitated discussion around the table.

Planning Process:

- 1) Information Gathering: was attempted when the Inventory Work Group, headed up by Sue, sent out questions after the last conference call. She received 4 responses prior to the meeting.
- 2) Developing a categorized list of issues to be addressed is putting like-minded things together.
- 3) Goals are identified: Goals are the WHAT we want to do.
- 4) Goals are prioritized
- 5) Develop approaches for goals: Approaches begin to flesh out the HOW
- 6) Approaches are prioritized.
- 7) Develop an Action Plan: The Action Plan will fall out of prioritizing the Approaches.

The process won't catch everything, but it will be enough to get started until next time.

To gathering information, we did something similar to a personal inventory, except in the reverse order. We were asked two questions about this service body (CANA) and were to respond from our own perspective:

- 1) What is working? (Responses from the floor):
 - Sharing at the assembly
 - Annual meeting
 - Vision Statement
 - Translation
 - Training/leadership
 - Feedback
 - Convention/Workshops
 - Website
 - Fellowship development
 - Conference calls
 - Attendance
 - Experience/Effective Communication
 - Information exchange
 - Take personal responsibility/ Updates on shared issues
 - Small workgroups.
- 2) What is not working? (Responses from the floor):
 - Flow of information is inconsistent
 - Orientation to CANA
 - Lack of Perception of CANA/appreciation
 - Lack of recognition.
 - FDC

- Language Barriers
- Distance, Expanse of Geography
- National Organization “Recognition”
- Lack of follow Through by workgroups
- Efficiency – things don’t get done.

This isn’t necessarily a complete list and you may not agree with everything on the list.

To develop a categorized, prioritized list of issues: we were each given 3 sheets of paper and asked to identify issues of importance to us. Put one on each sheet.

- Issues that were similar (in the same category) were put up on the wall together.
- We started with the following categories:
 - i. Credibility
 - ii. Communication With fellowship
 - iii. Communication external to Fellowship – Recognition/PR
 - iv. Support each other (communication)
 - v. Accountability
 - vi. Accessibility – Outreach/FDC
 - vii. Language Barriers
 - viii. Resources: Accessibility/Outreach/FDC - Language

We moved all papers into one of above categories. Steve went through the categories again to see if we wanted to shrink it further. We combined papers that said about the same thing. Then separated out again. We went through this a few times until we felt we had the categories.

At this point we had done information gathering (Step 1) and developed a categorized list (Step 2).

Next, we move to Developing Goals.

We were each given 2 dots.

We put our dots on items we thought most important to talk about now: Top two were Accountability and Recognition. We will use this information to set goals.

- 1) Accountability – 9 Dots
 - a. Continuity of message and fellowship
 - b. Follow through with what we say we’ll do
 - c. Commitment to tasks-follow-up needs improving
 - d. Follow-up missing.
 - e. Updates on goal attainment
- 2) Recognition/Public Relations – 6 Dots
 - a. National Recognition that “NA Works” in Canada
 - b. Interaction with National Professionals and Governmental organizations
 - c. Not viewed as valuable program of recovery by federal institutions

- 3) Communication with Fellowship – 5 Dots
 - a. Being recognised as a national resource
 - b. Communication with Fellowship – Newsletter Webzine
 - c. Meeting lists, web pages, all forms of info into isolated areas
 - d. Not seen as needed due to doubling of services with WSC
 - e. Flow of info exchange
- 4) Support each other (communication) 5 Dots
 - a. All inclusive teamwork (all participants)
 - b. Unity and Communication
- 5) Resources – 5 Dots
- 6) Credibility
 - I didn't get the complete list of 4) to 6) but Jim kept the papers.
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We have now developing (Step 3) and prioritized (Step 4) Goals.

Steve/Muk recommended moving Accountability under Resource as a part of completing resources. Most of the table had an issue with this. But it was explained that we are the resource. We will get another change to re-prioritize. Credibility seemed to fall under a few other categories.

(Step 5): Create Approaches: We counted off by 4s again. On large papers on the wall were the top 4 goals. Each group had 5 minutes at each paper where they listed off approaches that could be used to attain the goal. Then all groups went around explaining what they had written and duplicate approaches were removed.

(Step 6): Prioritize Approaches: We each put two dots on each list to prioritize which approaches to look at first.

Following are the top 4 Goals with their prioritized approaches as defined at the CANA/ACNA conference meeting on November 02, 2006.

1) Improving External Recognition (Professional, Government/Federal)

1A: Proactive with Professionals	13
1B: Use letterhead, business cards	
1C: Be “professional” with professionals	
1D: Educate - Do's & Don'ts of service	
2: Advertise through their association (NAWS does this)	12
3: Attend professional events	5
4: Target specific contacts within specific associations and not spread too thin.	3
5: Invite them (professionals) to workshops	2
6: Consistency/cohesion in provision of services	1
7: Survey the membership	

8: PSAs
9: Utilization of special workers (Consultants)
10: Collaboration with Regions/Areas/NAWS
11: Rebuilding relationships
12: Follow-up initiatives regularly

2) Resource Utilization

- a. Better identification/assessment
- b. Coordination
- c. Accountability

1: APT, realistic process, workshops (all levels of service)	11
2: Share/use available resources and use internet accessible literature	9
3: Frequent communication	9
4: Training and orientation	3
5: Match talent to task	2
6: Monitor & revisit goals – ongoing assessment	1

7: Follow-up - Take ownership, agreed upon values, behaviour, deadlines
8: Smaller conference calls
9: Templates
10: Leadership evaluation tool
11: Translation Services
12: Develop special resource materials for universal application
13: Electronic participation
14: Monitor the outcomes of the inventory process

3) Improving Internal Recognition “Communicating what we do”, working on “Perceptions”: With Fellowship

1: Expand distribution of Newsflash	14
2: RD to report to Region/area specifically on CANA/and informal	7
3: Become more Flexible in our Business approach	5
4: Leading by example, Model behaviour	4
5: Quarterly contact with RD’s	3
6: Change our perceptions about ourselves, work as a team.	2
7: Go to local meetings	2
8: Invite members to attend CANA	1

9: Co-Mentoring
10: Present at Regional Assembly

11: Do Survey/Feedback
12: Do workshops at conventions
13: Invite members from outside our meeting to have another point of view
14: More useful website
15: Hugs
16: Dispel myths
17: Make participation accessible via electronic
18: Think globally, act locally

4) Support/Building Community
a. Unity, sharing, mutual respect
b. Training and Orientation

1: Acknowledge clean dates for Committee Members	10
2: Mentoring list of current & former members	7
3: Being accountable and responsible	7
4: Developing new interests, encouraging volunteers	5
5: Orientation Packages	4
6: Continue roundtable – check-in & check-out	1

7: Be open-minded to new ideas
8: Hot Tub Time
9: Invite service members to our regional meetings or area meetings
10: Effective and positive communication
11: Hugs – contact and presence
12: Food and refreshments
13: Recognition of trusted servants
14: Make it fun, more interactive

(Step 7) Now that we have prioritized approaches we develop an action plan.

Steve suggested this be done with a smaller working group. Just because something is prioritized highest doesn't necessarily mean you do it first, but you do have to respect group conscience. The Action plan will also have to take into consideration Funds, resources.

NAWS wrap-up of APT:

- Everyone was handed a copy of the Area Planning Tool (APT) Handout.
- Mark presented the power point demonstration– Made by Ontario.
- Some Comments:
 - o Perhaps the facilitator shouldn't be the chairperson of the area. They may want an ex-chair or someone with similar skills so that current members are free to participate.
 - o It is harder to get Groups/GSRs involved when they don't have previous experience or the language/skill set.
 - o If an area requests help from the region, who pays for paper, pens, meeting space, refreshments? It depends on whether or not the Area has the money to cover it.
 - o An area needs to determine when to do it annually.
 - o Remember – Our Primary Purpose.
 - o Ontario's Power Point Presentation was done before the Handout.
 - o At the CANA meeting this week, we've already done steps 1-6, a working subgroup will do step 7 (Developing an action plan).
 - o There are two different options for Step Two (Listing Issues). The one at the end of the Handout is the way we went through it at the conference.
 - This process is heavily dependant on a Strong Facilitator
 - This second option works well with smaller groups.
 - o We did about 90% of what is in this document.

Step 7: Developing an Action Plan

- Steps 1-6 were done in the large group.
- Steve recommended going over the planning tool and find out where other actions (not just FDC) fit into this tool. He recommended not adding everything at once.
- We need to take the list of Goals with their approaches and fit our Action Plan into it along with timelines, points of accountability and resources. Who will do what by when and how much will it cost
- Suggested that Admin keep track of it – like we already do with the Action Plan. It contains Point Names and Timelines.
- Jim, Ross and Wendy went over the Actions that we came up with this week and fit them into the planning tool, creating an ACTION PLAN.

See Appendix II: For the Action Plan