Celebrating 70 years
1953–2023

Conference Agenda Report

CREATING OUR FUTURE

WSC 2023: 30 April–6 May

World Service Conference Mission Statement

The World Service Conference brings all elements of NA World Services together to further the common welfare of NA. The WSC's mission is to unify NA worldwide by providing an event at which:

Participants propose and gain fellowship consensus on initiatives that further the Vision for NA Service;

The fellowship, through an exchange of experience, strength, and hope, collectively expresses itself on matters affecting Narcotics Anonymous as a whole;

NA groups have a mechanism to guide and direct the activities of NA World Services;

Participants ensure that the various elements of NA World Services are ultimately responsible to the groups they serve;

Participants are inspired with the joy of selfless service, and the knowledge that our efforts make a difference.

CREATING OUR FUTURE

When we are engaged in creative action of the spirit, whether in our personal lives or in our service work, we may be surprised by the solutions that present themselves.

Guiding Principles, **Introduction**

Conference Agenda Report

WSC 2023

30 April – 6 May

Woodland Hills, California

2023 *Conference Agenda Report*
World Service Conference of Narcotics Anonymous

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www.na.org/conference
11/22

Table of Contents

Creating Our Future 1

Delegate Preparation for WSC 2023 8

Fellowship Intellectual Property Trust 11

Virtual Meetings 20

Their Own Language and Culture 22

Trusted Servant Term Lengths 26

Where in the World Is WCNA? 28

Future of the WSC 30

Literature, Service Material, and IDT Survey 39

Human Resource Panel Report 43

Regional & Zonal Motions 45

Motions & Survey Tally Sheet 62

Glossary 72

ADDENDUM A—*Fellowship Intellectual Property Trust* and Operational Rules 78
Clean Copy of Proposed Revisions

ADDENDUM B—*Fellowship Intellectual Property Trust* and Operational Rules 124
with Recommended Changes Tracked

ADDENDUM C—*Intellectual Property Bulletin #1* 171
Clean Copy of Proposed Revision

ADDENDUM D—*Intellectual Property Bulletin #1* 176
with Recommended Changes Tracked

ADDENDUM E—List of Published Materials Showing Categories and Translations 183

A Vision for NA Service

All of the efforts of Narcotics Anonymous are inspired by the primary purpose of our groups. Upon this common ground we stand committed.

Our vision is that one day:

Every addict in the world has the chance to experience our message in his or her own language and culture and find the opportunity for a new way of life;

Every member, inspired by the gift of recovery, experiences spiritual growth and fulfillment through service;

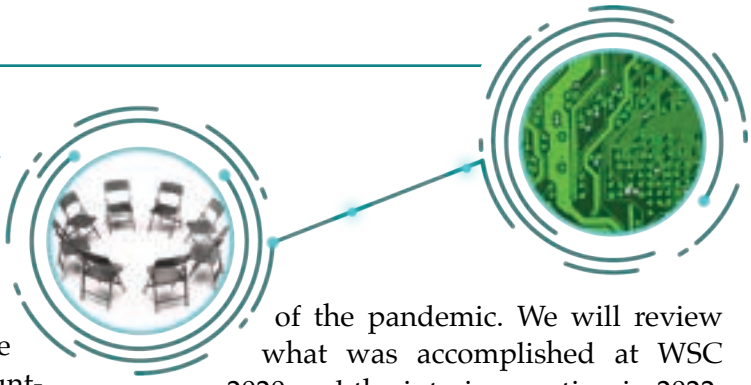
NA service bodies worldwide work together in a spirit of unity and cooperation to support the groups in carrying our message of recovery;

Narcotics Anonymous has universal recognition and respect as a viable program of recovery.

Honesty, trust, and goodwill are the foundation of our service efforts, all of which rely upon the guidance of a loving Higher Power.

CREATING OUR FUTURE

Creating Our Future



Hello from Your World Board

The theme of this conference is *Creating Our Future*. If you follow World Services' reporting or keep up with World Service Conference–related discussions, you may know we've been talking about the future of the conference for a long time now. Despite countless conversations about creating a more sustainable and effective WSC, the conference has been seemingly reluctant to make decisions that would put some of those ideas into practice.

And then in early 2020 the whole world changed, and NA changed with it—ready or not! In the time since the 2020 *Conference Agenda Report* was written, NA has learned to recover and serve online; World Services has developed online decision-making processes; we've stopped printing and mailing reports; and we are currently closing out the first-ever three-year conference cycle. More on all of that below.

When the global shutdowns happened, NA was well positioned to adapt. As a Fellowship, we already had experience with online and phone recovery meetings. The Fourth Tradition empowers groups to move quickly to meet the needs of their members without having to wait for central organization or direction. As an increasing number of meetings popped up online, NA became more accessible to some addicts who might not otherwise have found us, and many members were exposed to the global nature of the Fellowship for the first time.

World Services had to spring into action to migrate the impending World Service Conference online. Thankfully, conference participants had become accustomed to meeting online every other month and receiving information via email and Dropbox. We all worked together and had the first-ever online WSC, and now we are planning for the first in-person conference (hybrid, actually) in five years.

In this opening essay, we will supply some context that may be helpful when considering the motions in the *CAR*. We will touch on the crisis that World Services was thrust into at the onset of the pandemic. We will review what was accomplished at WSC 2020 and the interim meeting in 2022, and we'll explain the backlog of work. Then we will give an overview of the *CAR* contents and preview of the Conference Approval Track material, which will be posted in January.

The Crisis

In March 2020, the world began to shut down in response to the pandemic, and World Services was plunged into a resource crisis. The vast majority of NA World Services' income has historically come from literature sales. When meetings around the world closed their doors or went virtual, literature sales dried up overnight. World Services' income from literature was reduced about 85 percent. We made a series of rapid, difficult decisions about staffing so that the World Service Office could continue to function. We laid off the most recently hired staff, then we furloughed more than half the remaining staff. For a period of time, all staff were put to half-time.

We have, more recently, been clawing our way back. We've brought back some furloughed staff, as we've been able, and we've recently made several new hires. Nonetheless, we are still at two-thirds the staff level we were at a few years ago. We are moving in the right direction, but we are not "there" yet.

The bright spot in all of this has been NA members. In March 2020, we began sounding an alarm that we needed financial help, and members responded. For decades we've talked about the need for World Services to shift from an income model that depends on literature sales to one that is self-supporting through member contributions, and we have finally made substantial progress toward that goal. To all of the NA members who have helped—thank you, thank you, thank you.

We are out of crisis, just for today, but we don't want to lose sight of our goal—to decrease reliance on literature sales by increasing member contributions. *A Guide to World Services in NA* defines NA World Services' basic purposes as "communication, coordination, information, and guidance. We provide these services so that our groups and members can more successfully carry the message of recovery and so that our program of recovery can be made more available to addicts everywhere." (*GWSNA*, p. 2)

It may sound simple, but it takes a lot of resources to perform those functions for a Fellowship as large and diverse as NA. Before the global shutdowns, there were more than 76,000 meetings in over 140 countries. World Services oversees translations, production, and distribution of literature in 57 languages. With translated titles, we publish thousands of items. We administer the World Convention and World Service Conference and hold dozens of service-related web meetings each year. We protect the Fellowship's copyrights; provide support to service bodies and NA events around the world; create, gather, and post resources to support service delivery; maintain meeting list information; facilitate access to literature for incarcerated people through books and agreements to load literature on tablets; send free or subsidized literature to those in need; and much more. The *Annual Report* gives a good picture of World Services' activity each fiscal year: **www.na.org/ar**.

It takes a lot to do what we do on behalf of the Fellowship, but we've always believed that together we can move mountains. At the beginning of the pandemic, we asked members to consider a recurring contribution to World Services (**www.na.org/contribute**) and to help spread the word. Many of us contribute a dollar a month for every year of our cleantime. It's a simple, concrete way to give back. Of course, not everyone is in a position to be able to contribute financially, but if you are, we hope you will consider it. If each of us does a little, that adds up to a lot.

The emergency wrought by the pandemic wasn't just financial. It was logistical as well. The global shutdowns were instituted on the heels of the final board meeting we had scheduled before WSC 2020. In fact, one of the board members who had stayed on for a week to coordinate a workgroup meeting for the Spiritual Principle a Day Project got stuck in Los Angeles because of shutdowns and travel restrictions. It took him 62 days to get home.

WSC 2020 and WSC 2022

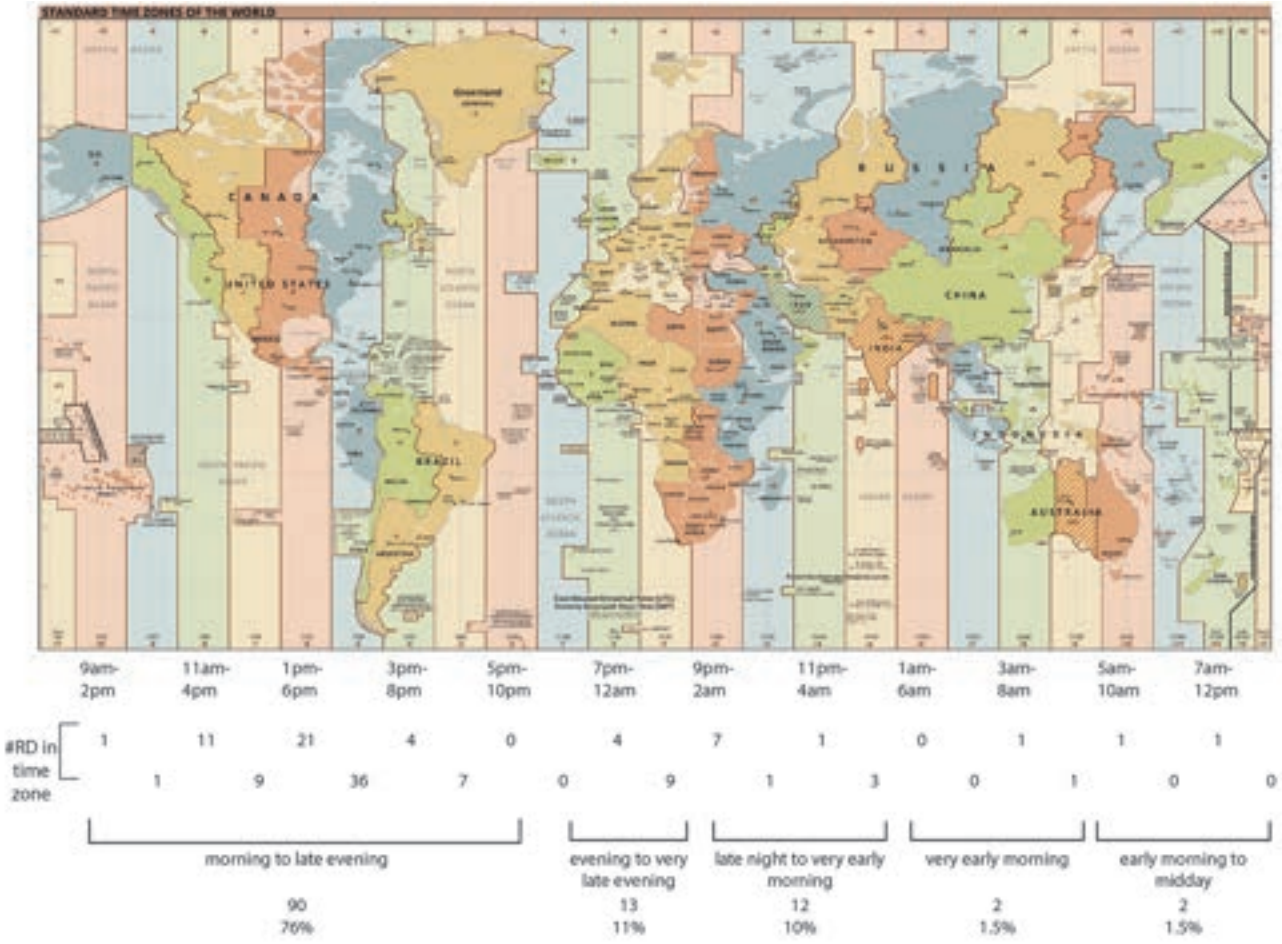
We had been planning for a World Service Conference in April 2020, but the world shut down in March. The situation changed very rapidly at the beginning of the pandemic, and we kept lines of communication open with conference participants through frequent emails, web meetings, and polls. We sent more than a half dozen emails to all conference participants in the last half of March 2020! There already was a conference participant web meeting scheduled for 28 March, and at that meeting participants discussed options for WSC 2020, and then made decisions via e-poll afterward.

The end result was the first-ever entirely online WSC, which was also the first-ever WSC to take place in two parts. Part one was 24 April through 3 May, and part two was 7–9 August 2020. Conference participants (CPs) determined the agenda of the meeting, which was another first for the WSC. CPs decided what to address at the conference through e-poll in advance of the meeting. As a result, not all 2020 *CAR* motions were discussed or decided upon. At

the close of WSC 2020, the board committed to reaching out to the makers of the motions that were not prioritized to be addressed and asking them if they would like to include the motions in the next *CAR* (which is this 2023 *CAR*).

It was challenging to adapt our processes for an online environment. That first meeting was nine days long, and some participants had to join in the middle of the night. Discussions about time zones and scheduling of sessions were some of the most difficult. This map shows the distribution of participants around the world and the truly impossible task of scheduling sessions during times that work well for everyone. We are very grateful for the participants who showed up no matter what. Thank you!

WSC 2020 PARTICIPANTS' TIME ZONES



All the materials for WSC 2020, including all the e-poll results, are posted here: www.na.org/?ID=wsc2020virt.

Zooming out from the details about the sessions and decisions, some of the most significant takeaways from the experience are that we learned we can set an agenda, meet, and make decisions online. Anyone who has been to both an in-person and an online WSC will tell you they are not the same thing. One is not a substitute for the other, but we adapted and it worked!

If this were a fairy tale, not long after WSC 2020 we would have been fully self-supporting through member contributions, the pandemic would have been a memory, and we would all have been looking forward to an in-person WSC in 2022. Instead, the financial and health crisis lingered. The World Board had extensive discussions, both as a board and with other conference participants, about how to approach the WSC in 2022. The board issued two recommendation reports and discussed the options at a conference participant web meeting, after which participants decided via e-poll to extend the conference cycle a year and hold an interim meeting in 2022 to deal with essential business.

Motion V2: Due to travel restrictions and safety concerns from the global COVID-19 pandemic, the 2020–2022 Conference cycle is extended to 2023. A short, interim, virtual, Conference business meeting shall be held in 2022 to fulfil our obligation to address legally essential business, as described in Motion V3, and to approve the Spiritual Principle a Day book if the WSC chooses to do so. After the essential business is conducted, the 2022 virtual meeting of the WSC shall recess and reconvene in 2023. Dates and deadlines pertaining to the meeting of the Conference in 2023 shall be provided by the World Board, including *CAR* motion deadlines, and seating application deadlines.

Maker: World Board

Intent: To adapt the current Conference schedule due to the global pandemic.

Decision: 110 yes (92%), 7 no (6%), 3 abstain (3%), 3 present not voting

Those recommendation reports and the poll results are all posted here: **www.na.org/?ID=background-discussion-22-23**.

Carryover Motions from 2020

That brings us to WSC 2023.

Ten of the *CAR* motions from 2020 were not prioritized by participants to address at the virtual WSC meeting that year.

Seven of those ten motions were from regions or zones. As promised, the board reached out to each of the makers, and five of the seven asked that their motion be included in this *CAR*. Those motions, as they are now numbered, are Motion #13 from Argentina Region, Motion #14 from the Sweden and Australia Regions, Motion #16 from Baja-Son Region with six regions as co-makers, Motion #17 from California Inland Region, and Motion #22 from Southern California Region. (For a complete list of motions in this *CAR*, see the tally sheet on page 62.)

A word about motion order: Because World Board members are elected by, and trusted servants of, the World Service Conference, motions being offered by the board come first in the *CAR*. Regional and zonal motions follow. We try to organize all the motions in an order that makes *CAR* workshops easier, grouping similarly themed motions together. At the conference itself, the WSC Cofacilitators, who are also trusted servants elected by the body, determine the order of business. The initial straw poll results, *GWSNA* policies, the motion sequencing, and the day's scheduling all help to inform the Cofacilitators' decisions about the order.

Three of the motions unaddressed in the 2020 *CAR* were from the board, and at the board's recommendation, participants opted to wait until an in-person WSC to consider them. The board has included motions in this *CAR* to cover two of the three issues: Motions #2 and #3 are to revise the *FIPT* Operational Rules and *Intellectual Property Bulletin #1*, respectively. The other board motion left from 2020 was to approve the long-term goals from the NAWS Strategic Plan, and we are not making that motion here. Typically, the NAWS Strategic Plan is included in the Conference Approval Track material along with the project plans it gives rise to. This is not a typical cycle, however, and we have not engaged in our strategic planning process this cycle. We are still catching up on work, and will be offering project plans for work we are already committed to and for work the conference prioritizes. We intend to reboot the strategic planning process at the upcoming WSC with the help of the conference. More will be revealed.

The Backlog of Work

This has been a cycle like no other. We've done more than we imagined was possible with fewer resources than we've had in decades. For a partial list of activities, see page 32 of this *CAR*; also, the *Annual Report* documents our activity each year: **www.na.org/ar**.

We have learned a tremendous amount, and we are optimistic about the future. Technology has allowed us to meet more often than ever before—as a board and together with other conference participants. We are excited to work together as a WSC to restart the strategic planning process, and we believe that we can lever-

age technology and increased communication to better collaborate with zones on some of World Services' work. The future is bright.

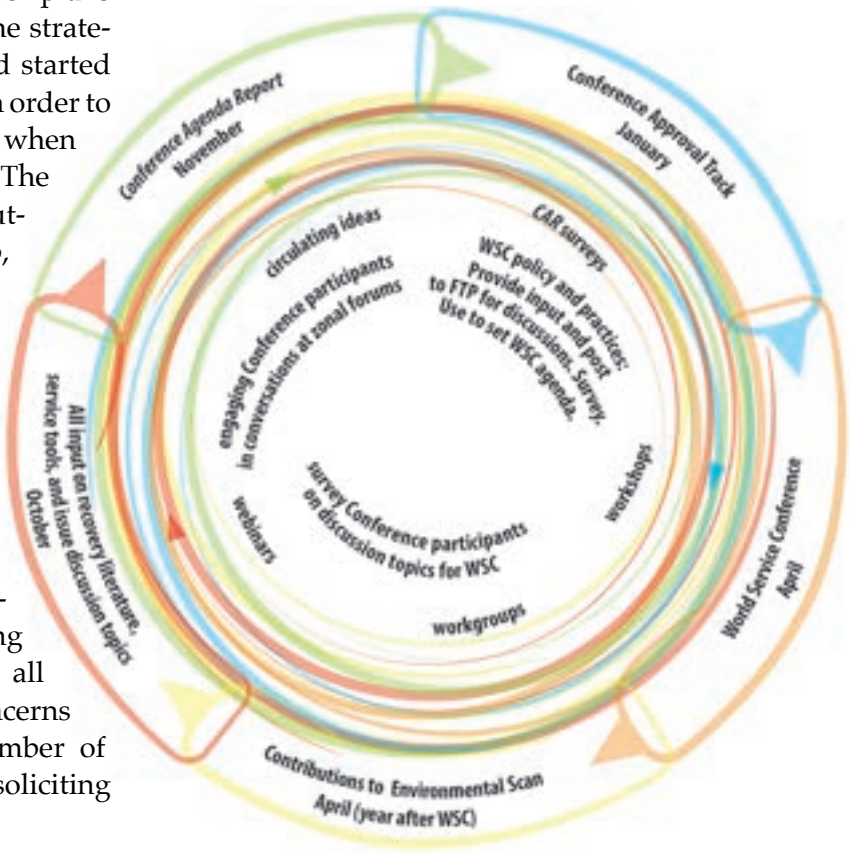
But at the same time, there is a large backlog of work. Some of that is due to staffing and other administrative factors, most notably in translations and with our database. We are working hard to catch up in translations after staffing turnover and shortages. We recently transitioned to a new database system that will have been a great change . . . once we get caught up with entering meeting information. As we onboard the new staff and continue to regain stability, we will get caught up with what might be called "essential services"—the ongoing work we do at World Services. The majority of work outlined in the budget and accomplished at NAWS is this type of ongoing service.

In addition, we work on projects related to new ideas and resources, work that drives change, and that is the other way in which we are backlogged: We are committed to more work, as a result of conference decisions, than we can accomplish. How we got here is a bit more complicated to explain; we will do our best. (We also cover this issue in the introduction to the survey in this *CAR*.) The conference approves this work by passing project plans. Those project plans arise from the priorities identified in the strategic planning process. The World Board started using a planning process decades ago in order to be more thoughtful and, yes, strategic when planning the work for the cycle ahead. The board looks at the trends inside and outside of NA, the needs of the Fellowship, and the resources available and selects a work plan considering all of these things together.

The problem with that process is that, while the board makes every effort to be as responsive as possible and listen to all delegates—traveling to zonal forums and other events to talk in-person with conference participants, holding web meetings, answering emails, and having phone calls—not all regions and zones have seen their concerns reflected in the plans. And so, a number of cycles ago, the board started actively soliciting input for the initial stages of the planning process, what is called "scanning." Prior to the 2018 and 2020 strategic plans, the board sent out surveys to collect input for the scan. It was a start at building a more cooperative planning process, but we believe we can improve.

The goal is to get to a point where regions and zones know they have been heard and understand that the plan is a result of a collaborative process. Not everyone's ideas will end up in the final set of project plans, but if everyone recognizes that they have been heard and understands and respects the process, that will be a truly inclusive strategic plan. We know we are not there yet, and as a result, regions and zones sometimes feel like the only way to ensure that their concerns are addressed is by making a motion in the *CAR* to create a project plan. That means there are two potential sources for project plans: the strategic planning process and regional/zonal motions. The result is more projects or potential projects than there are resources to accomplish the work.

COLLABORATIVE STRATEGIC PLANNING PROCESS USED 2017–2020



What we need is a process to look at all the ideas side by side and make decisions about which are most important to tackle first. An improved strategic planning process might accomplish that. In the meantime, we use a survey in the *CAR* to help the conference set priorities for recovery literature, service materials, and Issue Discussion Topics.

In 2016, we began including all recovery literature, service material, and Issue Discussion Topic ideas that come in through motions or conference participant input in this survey. Instead of offering specific project plans in the Conference Approval Track material for recovery literature, service material, and Issue Discussion Topics, we offer a general plan and the conference selects the specific focus using the *CAR* survey results as a guide. This will be the fourth time we have utilized this process.

When a motion to create a project plan for a specific piece of recovery literature or service material passes, the specific idea in that motion gets included in the *CAR* survey. The project plan that is offered is a general project plan for recovery literature or service material. If the specific idea in the *CAR* survey is selected by the WSC as a priority, that will be the focus for that project plan.

We are at an uncomfortable transitional stage in the planning process, and the *CAR* survey is a kind of bandage or piece of duct tape that joins the two streams of ideas together. Again, the reason we are using the *CAR* survey along with general project plans is because we cannot actually accomplish all the ideas in the motions that call for project plans. We need a process for the conference to use to look at all the ideas together and determine priorities. For now, that process is the *CAR* survey. *A Spiritual Principle a Day*, IP #30: *Mental Health in Recovery*, and *Virtual Meeting Basics* are all the result of the conference using the *CAR* survey to establish a focus for general project plans for recovery literature or service material.

This current *CAR* survey contains four ideas from previously approved motions to create project plans. These four ideas are all noted in the survey in blue ink with an asterisk and the date the motion was passed at the end of the entry. The survey also includes the ideas from the four motions in this *CAR* to create or revise recovery literature.

It's not a perfect system, to be sure. It's not even really a system, honestly, but it's our best attempt to avoid committing to more work than we can accomplish. Part of the future we hope to create together as a conference is a planning process that considers all ideas together and that has the confidence of participants.

What's in This *CAR* and How Do I Get One?

In addition to the *CAR* survey, this *CAR* contains 25 motions. Twelve are from the World Board, and 13 are from regions or zones. The first three board motions are related to the *Fellowship Intellectual Property Trust* (*FIPT*). The *FIPT* is a legal document, and so it can be dense reading. If you're new to the topic, you might want to check out the video on **www.na.org/fipt**, which explains what the *FIPT* is and gives some background. The five motions after the *FIPT* section cover a range of subjects: virtual meetings, the vision statement, locally developed stories, board member term lengths, and the World Convention of NA. Motions #9–#12 ask for decisions about the future of the World Service Conference.

It may sound like the opening of a bad science fiction book, but the future is, in some real senses, here. Virtual WSC meetings, a three-year cycle, electronic decision making . . . we are eager to continue creating this future together.

> *Living just for today, we have no way of knowing what will happen to us. We are often amazed at how things work out for us. We are recovering in the here and now and the future becomes an exciting journey*
>
> Basic Text, More Will Be Revealed

The 13 motions from regions and zones are grouped by topic to make them easier to workshop. Also, where possible, we included the ideas in these motions in the *CAR* survey lists so that they can be prioritized in relation to other recovery literature and service material ideas.

If this is the first time you've read a *Conference Agenda Report*, it may be overwhelming. Don't be discouraged. Most of us felt that way once too. Over time, you'll get used to the acronyms and issues. There is a glossary to help define some terms and tally sheets to record your votes on motions and the survey. The *CAR* survey is also posted online at **www.na.org/conference** for any member to fill out before 1 April 2023. Not long after the *CAR* is released, we post PowerPoint presentations and videos of the content on **www.na.org/conference** to help members put on or prepare for *CAR* workshops.

Regions and zones approach collecting a conscience on the contents of the *CAR* in a variety of ways. Some tally group votes; some tally area votes; some gather every interested member and count individual votes. If you aren't sure how it's done in your region or zone, ask a local member who has service experience, or contact NA World Services and we will connect you with your delegate.

Many members have been asking for a long time if we could discontinue postal mailings of paper reports, and this is another change the pandemic hastened. Due to staffing and financial shortages and logistical challenges, we discontinued paper subscriptions and reports in March 2020. It worked out well to post the *CAR* and Interim *CAR*/CAT online, and we intend to continue that approach for all of the WSC 2023 conference reporting. The *Conference Agenda Report* is the first of three main conference reports. The Conference Approval Track material is the second, and the *Conference Report* is the third.

Conference Approval Track and Other Material

The Conference Approval Track (CAT) material includes materials intended for committees or boards and is posted 90 days before the WSC, which in this case is 30 January 2023. We have not yet drafted the CAT material, so we have not finalized the contents. The CAT always contains the budget and project plans for WSC consideration and information to help the WSC make decisions about seating: requests for WSC seating from regions, the Seating Workgroup recommendations, and a report with recommendations from the World Board. When there is service material for the conference to approve, it is generally included with the Conference Approval Track. Typically the CAT also includes the strategic plan, but as we mentioned above, that will not be the case this time. This year we have no service material for approval in the 2023 CAT, but we may have some motions related to policies in *A Guide to World Services in NA*. We also post material from regions that submit ideas to be released with the CAT material. We began this practice in 2016, and we will continue to do so for this conference. The deadline to submit material to be included with the CAT posting is 1 January 2023.

The final major release before the WSC is the *Conference Report* (*CR*), which walks through the conference week, day by day, session by session, and includes the regional reports from which we draw and report data for the next two years. The *CR* includes information participants will need for the WSC discussions and decisions, and relevant ideas we have heard since publishing the *Conference Agenda Report*. Conference participants can submit material to be published with the *Conference Report*. The deadline is 15 February 2023. We post the *Conference Report* not long before the WSC. All conference publications and related material are posted on this webpage: **www.na.org/conference**.

The essay that follows this introduction is intended to help conference participants—delegates and alternates—prepare for the WSC.

Delegate Preparation for WSC 2023

This section of the *CAR* may be most relevant to conference participants—regional and zonal delegates and alternates. In the following pages, we will review some of the things that happen at each conference and some of our expectations for WSC 2023. We will also list some important deadlines.

> *Although you may not feel this way, your participation here is valuable and it helps those who will be here later. It is here where the future will be built, where unity is strengthened and where you will find the necessary strength to continue carrying the NA message and support your local fellowship.*
>
> From 2008 "Dear Delegate" letters written by conference participants for the delegates ten years in the future

WSC 2023 will be the first in-person conference in five years, and it will mark the end of our first three-year conference cycle. It's also likely to be the most hybrid WSC we've ever had. WSC 2018 had a delegate and two alternates attend virtually, but we anticipate many more in 2023, given the challenges many delegates are facing with travel and visas.

All those firsts mean that it's going to be hard for us all to prepare for WSC 2023. When we do things for the first time, we usually learn a lot—sometimes by bumping our heads. If you are a conference participant or trusted servant of the WSC, the most important things to bring to the meeting (whether you're attending in person or online) may be patience and goodwill. (It's not a bad idea to bring those to *any* service meeting!)

Delegates and alternates do a massive amount of work throughout the cycle—this has certainly been true in the time since WSC 2020—and we want to say a huge thank you to all. We are grateful for you. There is a tremendous amount to read, process, synthesize, explain to others, and gather a conscience on, with the lion's share coming in the five months between the publication of the *CAR* and the end of the WSC.

Here are some things to look out for that you will need to pay attention to and complete:

WSC registration form and travel and rooming memo: The travel and rooming memo explains how to register for the conference and how to make hotel and flight reservations. It will be posted on www.na.org/conference when the *CAR* is posted. **Please fill out the registration form as soon as possible, regardless of your funding status.** If you need to make changes afterward, we will assist you. You must finalize your hotel stay by 1 March 2023, and you must book your flight by 15 March 2023.

Regional reports and zonal snapshots: The deadline for regional reports is 15 February 2023. We use the information from these reports to help plan conference sessions, and they also serve as a historical record for the future. Regional reports paint the best picture of NA service efforts worldwide that we know of. The reports we receive by the deadline are summarized and posted in their entirety along with the *Conference Report* at www.na.org/conference. For the past several conferences, almost all seated regions submitted their reports by the deadline. Let's not break the streak.

We also collect information from zones each cycle that we publish in a Zonal Snapshot format. (Here's the 2020 version.) We reach out to each zone individually and ask for updates and any new information we intend to include.

We recognize that collecting information about meetings and service delivery may be more challenging now given the instability of the last several years, but whatever information you do have will help paint a picture for the WSC of who we serve. Thank you in advance!

***CAR* survey:** The *CAR* survey is posted on the conference page (www.na.org/survey) for members to fill out. We also ask delegates to fill out the survey on behalf of their region or zone. We collate survey results from members and also from regions/zones. Both sets of

results are reported side by side for conference participants to use when selecting priorities for recovery literature, service material, and Issue Discussion Topics. The *CAR* survey results are also always included in the appendices for the WSC minutes.

WSC topics survey: As with the *CAR* survey, we will be surveying all participants to see what you want to discuss at WSC 2023. We will email you when the survey is posted.

Thank you all for your service! Please let us know if we can help in any way.

What Happens at the Conference?

The conference marks the end of one planning cycle and the beginning of the next. As such, part of the job of participants is to approve the work that has been done since the last WSC and to help frame the work ahead. The beginning of the week is spent welcoming participants and then in *CAR*-related discussion and decisions. Throughout the week, there are presentations, discussions in small groups, and decision-making sessions. Toward the end of the week, the conference makes decisions about the budget and project plans for the cycle ahead and has discussions about new ideas.

We have not planned out the conference week yet, but we know some of the items that will likely make up part of the agenda:

- A welcome session with introductions and time to hear from newly seated regions (WSC orientation will happen virtually in advance of the WSC)
- Public relations and Fellowship development presentations for the activity of the last three years
- Reports from World Services and the Human Resource Panel
- A presentation of proposed budget and project plans for the cycle ahead, including a discussion of priorities identified in the *CAR* survey
- *CAR*- and CAT-related discussion and decisions
- Discussions of topics prioritized by delegates through a survey
- Time and space for zones to meet if they wish, and time devoted to zonal reporting
- Elections for World Board, HRP, and WSC Cofacilitators
- Discussions of prioritized new ideas submitted at the WSC
- Wrap-up session to review the work ahead and make any needed decisions

We are still early in the planning process, and this list is not complete. We are also uncertain of how organizing a truly hybrid event may affect the agenda. The *Conference Report*, which will be released shortly before the WSC, will lay out the conference week in detail.

Most sessions at the WSC are 90 minutes long. Breaks are a half hour by necessity. This is the time it takes for over 200 members to take care of their physical needs, grab a coffee or a smoke, and/or run up to their room to pick up something they forgot. Lunch is 90 minutes for similar reasons. Each day has four 90-minute sessions, unless we have a session after dinner, which is sometimes the case. We typically break for half a day midweek, which is the day that zones meet in the evening. So the conference week has time for 24 sessions plus whatever evening sessions we schedule.

Getting Ready

Preparing for the World Service Conference is a huge job. Delegates and alternates must not only read the *CAR*, CAT, *Annual Report*, and *Conference Report*, they must also be able to explain the issues to others and gather the conscience of their regions and zones. We provide as many helpful tools as possible, including PowerPoints and videos summarizing the *CAR* material to help in workshops.

We will have a virtual WSC orientation web meeting for conference participants, which we will record and make available to those who cannot attend. As with anything in NA, reaching out to more experienced members can be a huge help. If you are partnered with a more experienced delegate or alternate, they can help mentor you through "conference season." If you attend a zonal meeting, ask other delegates about their experiences and get numbers so you can call with questions. We hope to have a new conference participant bulletin board soon, and you can post questions there as well. And don't forget: You can always email the World Board at worldboard@na.org.

Important Deadlines

ASAP: Register for the WSC.

15 February 2023: Deadline to submit regional and zonal reports and material from conference participants for the *Conference Report*.

1 March 2023: Hotel arrangements must be finalized.

15 March 2023: Finalize flight arrangements for the WSC.

1 April 2023: All *CAR* survey responses are due.

1 April 2023: Please notify us if you intend to offer an amendment or seating motion.

15 April 2023: Deadline for amendments to *CAR* and CAT motions and seating motions.

At the WSC: New idea proposals (ideas that participants prioritize for discussion at the WSC) are submitted at the WSC itself.

Again, we know it's a lot to read and absorb. Reach out to us if we can help in any way. Thank you for your service!

A few handy URL Shortcuts for na.org

The full list can be found at www.na.org/aboutus

Annual Report	www.na.org/ar
American Sign Language Resources	www.na.org/asl
Area, Regional, and Zonal Events	www.na.org/events
Audio Basic Texts	www.na.org/audio
Contributions	www.na.org/contribute
Electronic Literature	www.na.org/elit
Fellowship Intellectual Property	www.na.org/fipt
Local Service Resources	www.na.org/localresources
Local Service Toolbox Project	www.na.org/toolbox
Media	www.na.org/media
NAWS Electronic Subscriptions	www.na.org/subscribe
NAWS News & NAWS Updates	www.na.org/nawsnews
NAWS Webinars and Web Meetings	www.na.org/webinar
Public Relations	www.na.org/pr
Quick Contribute Button	www.na.org/give
Recovery Literature (with language menu)	www.na.org/ips
Resources for Professionals	www.na.org/forprofessionals
Surveys & Projects	www.na.org/survey
Videos	www.na.org/videos
Virtual Meeting Materials	www.na.org/virtual
Webstore	www.na.org/webstore
World Service Conference	www.na.org/conference

Fellowship Intellectual Property Trust

This *Conference Agenda Report* (*CAR*) includes three motions (Motions #1–#3) related to the *Fellowship Intellectual Property Trust* (*FIPT*). The *FIPT* is a legal document that lays out the collective decisions the NA Fellowship has made concerning its literature and logos. The trust document consists of two parts: the trust instrument, which is the *FIPT* itself (the subject of Motion #1) and the Operational Rules (the subject of Motion #2). The Use Policy (the subject of Motion #3) provides guidance about the use of registered NA trademarks and service marks by NA groups, service boards, and committees.

Motion #1 adds seated zonal delegates to the decision makers about the *FIPT* and about NA recovery literature. Motion #2 proposes changes to the *FIPT* Operational Rules. Motion #3 proposes changes to *Intellectual Property Bulletin #1*, more commonly referred to as the Use Policy.

We will try to explain the origin of these three motions and the changes we are recommending as straightforwardly as possible in this essay.

We have included two copies of each of the three documents in the appendices to this *CAR*. One copy shows the proposed changes, and another copy is a clean version of the revised document. The addenda are as follows:

Addendum A: A clean copy of the proposed revisions to the *Fellowship Intellectual Property Trust*, including the Operational Rules

Addendum B: A copy of the *FIPT* and Operational Rules showing all the changes we are proposing

Addendum C: A clean copy of the proposed revision to *Intellectual Property Bulletin #1*

Addendum D: A copy of *Intellectual Property Bulletin #1* showing all the changes we are proposing

In addition, you can find current versions of these documents as well as other material related to the *FIPT* posted at www.na.org/fipt.

It's important to keep in mind, as you wade through the proposed changes and the background and summary below, that the *FIPT* is a legal document. NA service material is written for addicts, but legal documents are written for the courts—judges and lawyers. Because NA literature is by addicts, for addicts, the Fellowship of NA makes the related decisions, even about complicated legal documents. So pour yourself a cup of coffee and dig in. And let us know if you have any questions: wb@na.org.

Thank you for your dedication to NA.

What Is the *FIPT*?

The *Fellowship Intellectual Property Trust* is a legal document with a long history in NA. The *FIPT* describes in detail how NA's *intellectual property*—our name, trademarks, and recovery literature—are protected and administered by Narcotics Anonymous World Services, Inc., so that NA can ensure our name and literature and trademarks are available to fulfill our primary purpose. The *FIPT* is first and foremost about the integrity of the NA message and the need to protect NA's property so that the Fellowship of NA can continue to own its own materials. The *FIPT* ensures that decisions made by the NA Fellowship about its literature and trademarks are respected and carried out.

The *FIPT* explains:

> The sole object and purpose of this Trust is to hold and administer all recovery literature and other intellectual properties of the Fellowship of Narcotics Anonymous in a manner that will help addicts find recovery from the disease of addiction and carry that message of recovery to the addict who still suffers, in keeping with the Twelve Steps and Twelve Traditions of NA.
> (*FIPT*, Article I, Section 4)

Motion #1: Revising the *FIPT*

At WSC 2020, participants made a decision to initiate the established process to consider revising the *FIPT* to include seated zonal delegates as decision makers for matters affecting the *FIPT* and NA recovery literature. This revision was necessary to reflect recent conference decisions: In 2018, the conference passed *CAR* Motion #18 that zones with two or more unseated NA

communities would be seated, voting participants at the WSC. At the close of WSC 2018, that became WSC policy, but the *FIPT* still identifies only regional delegates as decision makers for the *FIPT* and recovery literature. The *FIPT* is a legal document that has a unique process to be changed. A change to the Trust itself was necessary, and that process was initiated at WSC 2020 through passage of 2020 *CAR* Motion #5.

As called for in the *FIPT*, the proposed revisions were posted for review from 1 December 2020 through 31 May 2021. The response was so overwhelmingly positive about making this change that the documents presented in Addenda A through D assume this change throughout the documents. To present each idea separately would require even more addenda and just seemed too confusing.

Pages 1 and 2 in Addendum B in this *CAR* show the language we are proposing for what will be, if adopted, the first changes to the Trust itself since its adoption in 1993. (Addendum A shows the same language in a clean copy of the *FIPT*.) The Operational Rules have changed in the course of those 30 years, but the Trust itself has remained unchanged. Because we are asking you to consider the change to the *FIPT* to add zonal delegates as decision makers, we took the opportunity to clarify the difference between NA recovery literature and service material. This proposed clarification stems from some of the questions our attorneys were asked in a recent court case described later in this report. Since the *FIPT* is a legal document, it needs to be clear in a court of law to people who are not NA members.

Motion 1 **To approve adding zonal delegates from seated zones to the Settlor and Trustor of the *Fellowship Intellectual Property Trust* (*FIPT*).**

Maker: World Board

Intent: To reflect the decision at WSC 2018 to make delegates from seated zones voting WSC participants and honor the six-month Fellowship review of this proposal that occurred from December 2020 through May 2021.

Financial Impact: None at this time.

Policy Affected: These changes are from Pages 1 and 2 of the *FIPT* in Addendum A (clean copy) and Addendum B (changes shown)

ARTICLE II: PARTIES TO THE TRUST

The Fellowship of Narcotics Anonymous, as given voice by its groups through their ~~regional~~ delegates at the World Service Conference (WSC), is the Settlor and the Trustor. The delegates are the representatives elected by the regions and zones seated at the World Service Conference. Narcotics Anonymous World Services, Inc. is the Trustee of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust.

ARTICLE III: IDENTITY OF TRUST PROPERTY

The Trust Property includes all recovery literature, trademarks, service marks, copyrights, and all other intellectual property of the Fellowship. From time to time, the Trustor may add to, modify, or delete property from the Trust. All additions made to the Fellowship's recovery literature, trademarks, service marks, copyrights and all other intellectual property by Narcotics Anonymous World Services, Inc. shall additionally be considered property subject to this Trust. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is designated as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

Where Did This Project Come From? The Origin of Motions #2 and #3

The *FIPT* Operational Rules and Bulletins Workgroup was on a list of virtual workgroups agreed to at the 2018 World Service Conference.

During the 2016–2018 conference cycle, a region made a request to inspect the property of the Trust. The inspection took place shortly after WSC 2018, and you can find the report from that inspection on the *FIPT* web page: **www.na.org/fipt**.

This was the first time since the *FIPT* was adopted in 1993 that such a request had been made, and it raised some questions about the inspection process as it is described in the Operational Rules. We talked with participants at the conference about revisions we believed were necessary to update the section of the Operational Rules that describes how an inspection of the Trust can be performed.

In a straw poll at WSC 2018, the conference expressed consensus support (93-15-4-2) that a change was needed to Article V, Section 3, the part of the Operational Rules that we refer to as the Inspection Clause.

The board presented a possible revision of the Inspection Clause but did not ask the WSC to make a decision about these specific changes:

ARTICLE V, SECTION 3:
INSPECTION OF TRUSTEE ACTIVITIES

Conditions of inspection

~~Any regional service committee or equivalent service body~~ The World Service Conference may inspect the records and operations of the Trust on behalf of the Beneficiary, ~~providing the following conditions are met~~ if it so chooses. The details of such an inspection would be decided by the WSC.

The conference decided, with consensus support (89-22-0-2), to suspend the Inspection Clause until the close of WSC 2020, so that a decision could be made about how to handle inspections in the future.

And so, the conference agreed that a virtual workgroup should look at the Operational Rules and *FIPT* bulletins. The board created a workgroup composed of three US regional delegates, three US alternate delegates, a board member as point person, and a member from outside the US with decades of World Service experience, including as a member of the Board of Trustees, Board of Directors, and World Board. The majority of workgroup members were at the 2018 WSC, had heard the discussions, and understood the concerns that led to the workgroup's creation.

The workgroup met online throughout the conference cycle. They offered a series of recommendations that the board discussed at several meetings. After making some recommendations for relatively minor edits to the documents, the board accepted the workgroup's recommendations and discussed them with conference participants during a web meeting in August 2019. After that web meeting, we made recommendations for some nonsubstantive wording changes suggested by our intellectual property attorney; these were simply semantic changes, not changes to the substance of the recommendations. We then discussed our recommendations with conference participants again during the October 2019 conference participant web meeting. The end result was prepared for the 2020 *CAR* and has been carried over to become Motions #2 and #3 contained in this *CAR*.

When WSC 2020 was moved from an in-person to a virtual meeting due to the pandemic, the amount of material to be covered had to be reduced to accommodate a shorter number of hours in session. Conference participants were polled to determine what they wanted to consider at the conference. The World Board recommended to conference participants that the *FIPT* motions in the 2020 *CAR* be postponed until the next in-person WSC. The World Board polled conference participants, and they agreed with the recommendations and chose to delay consideration of what is now Motions #2 and #3 to the next in-person meeting of the WSC. Conference participants also decided at both virtual WSC meetings in 2020 and 2022 to continue the moratorium on the Inspection Clause until the next in-person WSC.

Why Is the *FIPT* Important?

While this work was taking place, World Services was involved in legal action challenging the *FIPT*. On 31 January 2020, NA World Services received notice of a lawsuit filed against NA World Services that challenged the right of the

It's extraordinary for an addict to get clean. In NA, we not only get clean but recover together in unity, carry a message, and fulfill service obligations. Tradition Two tells us this is possible because we are united under an ultimate authority. This Tradition frees us as members from the dangerous belief that we are in charge, or that some of us are more important than others. Seeing this Tradition at work in our groups offers a vision of hope. As we apply Tradition Two in our service—and in our lives—we begin to understand the power and grace available to us in surrender.

Guiding Principles, "Tradition Two"

delegates at the WSC to make decisions about NA literature and sought to vacate or eliminate the *FIPT*. NA World Services' position was upheld without leave to amend in September 2020. That decision was appealed, and again, NA World Services' position was upheld in April 2022, with a final ruling in July 2022. We have posted the relevant documents to **www.na.org/fipt** and kept conference participants informed along the way.

This was a lengthy, resource-consuming process with a direct cost to NA World Services, and by extension, NA as a whole, of over $340,000. Two years prior we had defended a challenge in Russia claiming that NA literature was anti-Russian at a cost of well over $100,000. And we are currently involved in legal action in the Philippines challenging a member's claim to own the NA name and literature at a cost of approximately $85,000. Why are we telling you all of this? Because we want to explain why the *Fellowship Intellectual Property Trust* was created and why it is important. The appellate ruling captures it well in this statement: "The Fellowship has its own literature which is vital to its mission." That reality and its critical importance is why the *FIPT* exists—to ensure that a consistent NA message approved by NA members is available today and into the future. That is why NA World Services has been charged with protecting NA's intellectual property. Each of these legal cases came about because one or more NA members believed they knew better than the NA Fellowship.

As a board and the body responsible for the Fellowship's primary service center, we remain committed to the Fellowship's conscience and the importance of the NA message. The theme of this conference cycle is Creating Our Future. We offer the next two motions with an eye to the future. We protect our message and our literature so that the addicts who find NA after us will receive the same gift we did.

Many of the proposed changes you will see described below are based on our experience over the last several years as well as previous conference discussions.

Operational Rules

The Operational Rules describe the way the *FIPT* is to be administered. Article I, Section 2 of the Operational Rules explains their purpose in detail:

> These rules describe the way the Fellowship Intellectual Property Trust is to be administered. They describe the intellectual properties held by the Trust, the parties to the Trust, the rights and responsibilities of each of those parties, and the relationship between them. They also describe specific means by which the rights and responsibilities of the Trustee can be revoked and reassigned, and the procedure to be used in altering specific provisions of the Trust Instrument itself.

There have been changes to the Operational Rules since they were initially drafted, but this is the first time we've taken a comprehensive look at updating them.

The most substantive changes we are recommending to the *FIPT* Operational Rules are to the Inspection Clause, which is Article V, Section 3 of the Operational Rules. The workgroup talked for a long time about the Inspection Clause, building on the possible revision the board had presented at the 2018 conference.

The Trust's beneficiary is the NA Fellowship as a whole, and the *FIPT* is clear that the World Service Conference (WSC) is the body authorized to make decisions on behalf of the Trust's beneficiary. Only the WSC can speak for the NA Fellowship as a whole regarding the *FIPT*. The revisions we are proposing would extend this logic to the Inspection Clause.

We are proposing a change in the Inspection Clause so that only the WSC, on behalf of the beneficiary, the NA Fellowship, could make the decision to undertake an inspection. This change seems consistent with the *FIPT* itself as well as with how we make decisions about any other aspect of service. We make decisions through a group conscience process. It seems appropriate to us that a decision to inspect the Trust, which is a costly and time-consuming endeavor, would be a decision made by the Trustor and not by a minority of conference participants. In no other aspect of World Services or conference work can a small number of regions direct activity rather than relying on the conscience of the Fellowship, as given voice by its delegates at the WSC.

We surveyed conference participants twice to get their input on the threshold for this decision—in other words, what percentage of the WSC could initiate an inspection. Three-quarters, 75 percent, of the delegates who responded to the survey preferred either two-thirds or a simple majority. Our hope was to arrive at a collaborative decision, and this provided us with an opportunity to experiment with vetting a motion, a process some participants have talked about wanting to try for the *CAR*. It seems to us that most of those who prefer two-thirds can live with a simple majority, so that is what we are offering for your decision. The proposed revisions to the Operational Rules state that if 50 percent of delegates plus one agree, an inspection request will be granted.

It may be helpful to note that an inspection has only been requested once in the lifetime of the *FIPT* (since 1993). Most of the questions members raise about NAWS' financial operations can easily be answered by referencing the financial statements we publish. We publish a two-year budget and explanatory cover sheet in the Conference Approval Track material before each WSC, and report the fiscal year's financial activities in the *NAWS Annual Report* each spring. We are audited annually, and the report from that independent audit is made available in each *Annual Report* along with our financial report for the same period. This past conference cycle, we have provided detailed financial statements to delegates every two months given the extraordinary nature of the financial situation. We do our best to remain transparent.

The other major change we are recommending to the Inspection Clause is revisions to make it easier to understand. We are proposing adding more language to the Inspection Clause so that it better explains to members how an inspection would work. Much of the language we are suggesting to help clarify the clause is excerpted from other sections of the Trust and Operational Rules.

The new language we are recommending to you for the Inspection Clause follows. As a reminder, the Inspection Clause is Article V, Section 3 of the Operational Rules.

SECTION 3: INSPECTION OF TRUSTEE ACTIVITIES

The Fellowship of Narcotics Anonymous, as given voice by its groups through their delegates at the WSC, is the Settlor and the Trustor of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. Only the Trustor can request and conduct an inspection of Trustee activities on behalf of the Trust Beneficiary. With the exception of any subject and items excluded by law, there are no limitations on what the Trustor can inspect.

Under Article IV, Section 12 of the Operational Rules, and consistent with California law, Narcotics Anonymous World Services, Inc., as Trustee, is required to, among other things: (1) prepare a year-end financial report for each fiscal year; (2) cause an audit of the Trust activities for each fiscal year to be performed by an independent certified public accountant that includes the revenues and expenses relating to the Trust Properties; and (3) provide a copy of both the financial report and independent audit to all participants of the WSC.

If, after a review of the financial report and independent audit, a member or any component of the NA service structure has questions or concerns, they can contact the World Board. If questions or concerns still remain after contacting the World Board, they would then be discussed through the established Narcotics Anonymous service structure. A request for an inspection can be initiated by any seated region or zone, through its elected delegate, submitting a request by motion to the Trustor, at the World Service Conference, through the *Conference Agenda Report*.

The standard threshold of two-thirds of voting participants at the WSC required to make a decision is changed in this Section 3 to a simple majority (50 percent plus one).

We are also proposing other, less substantive changes to the Operational Rules, as follows:

- Changes throughout to update the references to *WSC Boards and Committees* to better reflect our current structure. The *FIPT* was written before the World Board was created. The suggested language in the proposed revisions describes our current system, not that of 1993.
- More consistent terminology to refer to the *World Service Conference* (*WSC*), *Narcotics Anonymous World Services, Inc.* (*NA World Services*).
- Two edits to Article 4, Section 12: Trustee Reporting Obligation on page 15 to change *calendar year* to *each fiscal year* and to add *independent* to the description of the annual audit.
- Changing *representatives*, *conference participants*, and *RDs* to *delegates* throughout. While all of these terms are widely understood in NA, this is a legal document and consistency in terminology is important, and *conference participants* has no clear legal definition.
- Correcting errors by adding the word *the* on page 24 and other edits on pages 15 and 31.
- A change to the way the Inspection Clause is described on page 37 of the Reader's Notes so that the description reflects the changes suggested to the Inspection Clause itself.

These bulleted changes are primarily "housekeeping" edits to update the language of the Operational Rules to reflect current practice and to be consistent within the document itself.

The easiest way to see how the recommendations we are making would change the Operational Rules is to look at the revised version of the *FIPT*, with changes tracked, that is included in Addendum B of this *CAR*. The changes for the Inspection Clause are shown on pages 16 and 17 of that document.

Motion 2 To approve the revisions to the *FIPT* Operational Rules contained in Addendum B.

Maker: World Board

Intent: To revise the Operational Rules to reflect discussions at WSC 2018 about the Inspection of Trustee Activities and to reflect current practices, terms, and language.

Financial Impact: None at this time.

Policy Affected: Would replace the existing policy that is struck through in Addendum B and shown as revised in Addendum A.

A summary of the proposed changes shown in Addendum B includes:

- A change to the Inspection Clause to reflect discussions at WSC 2018 and clarify that only the WSC can act for the beneficiary—the NA Fellowship as a whole.
- Various "housekeeping" edits:
  - Changes throughout to update the references to WSC Boards and Committees to better reflect our current structure. The *FIPT* was written before the World Board was created. The suggested language in the proposed revisions describes our current system, not that of 1993.
  - More consistent terminology to refer to the *World Service Conference* (*WSC*), *Narcotics Anonymous World Services, Inc.* (*NA World Services*).
  - Two edits to Article 4, Section 12: Trustee Reporting Obligation on page 15 to change *calendar year* to *each fiscal year* and to add independent to the description of the annual audit.
  - Changing *representatives*, *conference participants*, and *RDs* to *delegates* throughout. While all of these terms are widely understood in NA, this is a legal document and consistency in terminology is important, and *conference participants* has no clear legal definition.
  - Correcting errors by adding the word *the* on page 24 and other edits on pages 15 and 31.
  - A change to the way the Inspection Clause is described on page 37 of the Reader's Notes so that the description reflects the changes suggested to the Inspection Clause itself.

Use Policy

We are also recommending changes to the Use Policy, which is described in *Intellectual Property Bulletin #1* (*IP Bulletin #1*). The bulletin spells out the conditions under which groups and service bodies can use and reproduce NA's recovery literature and registered trademarks.

We are suggesting a substantial rewrite of the bulletin, which makes it difficult to read the version of the document that has the proposed changes tracked. We are including a clean version of the text that we are proposing in Addendum C, and a tracked-change version of the bulletin in Addendum D.

These bullets summarize the most significant proposed changes to the bulletin. We will explain these points in more detail in the pages that follow.

- Permission would be required to reprint book-length pieces. This is the only significant policy change we are recommending to the Use Policy. Currently anyone can call themselves an NA group and the rights to reprint book-length pieces is automatically assigned, which makes protection of the NA message and NA's copyrights very difficult. We defined *book-length* as more than 25,000 words. (For reference, the Little White Book has just over 8,850 words.)
- Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats. These are not changes in policy; they are revisions to the bulletin to better reflect already-existing current policy.
- The introduction has been rewritten, and the section on copyright has been moved ahead of the section on trademarks.
- We are suggesting some copyediting changes as well, such as using the term *policy* throughout the document, rather than a mix of *policy* and *guidelines*.

There is a lot of misinformation circulating about these proposed changes, and we will do our best to explain these recommendations here.

Book-Length Pieces

The most significant change to the bulletin would be the proviso that groups must contact World Services for approval if they wish to reproduce book-length pieces of NA literature. The workgroup and the board talked about this change for a long time. We believe that requiring approval for the reproduction of books will help protect the Fellowship's literature. As we mentioned above, the current language in the Use Policy makes protection of NA's property quite challenging.

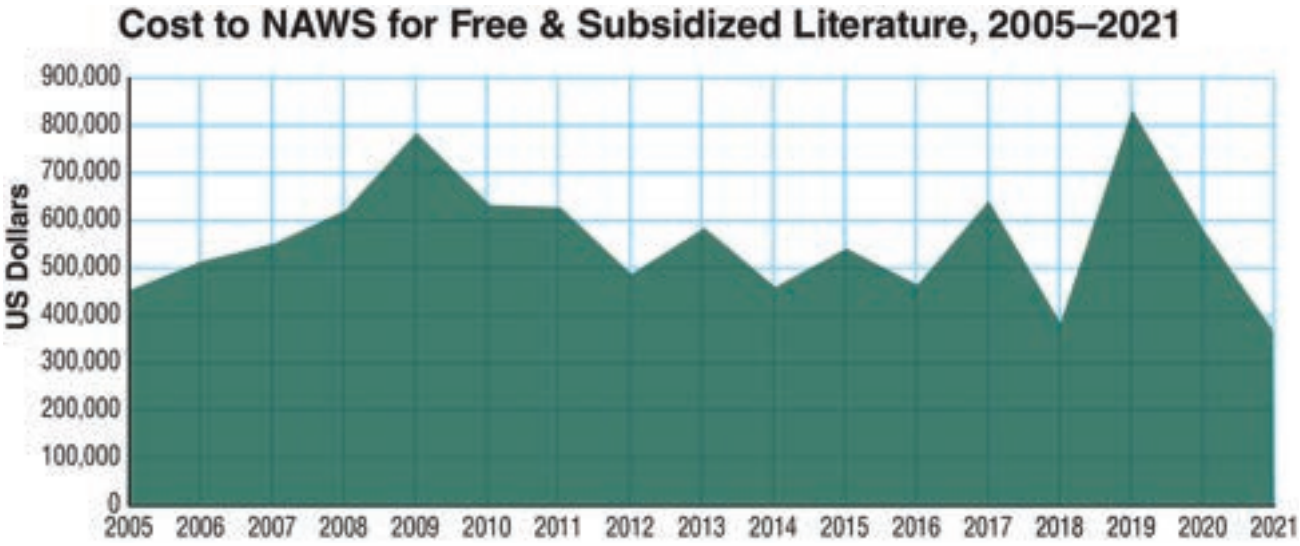
This change to the Use Policy, however, should not hinder a group's ability to address its literature needs. If a group is financially challenged and wants to reproduce NA Fellowship–approved book-length literature, we urge them to contact World Services to work out a solution. We supply literature for free or at a discount to many members and communities across the globe. We are committed to ensuring that the NA message is readily available at NA meetings. On the next page is a graph of the value of literature we have subsidized or given away each year (numbers for the past couple of years have been affected by the pandemic).

NAWS has successfully developed and maintained a distribution network that is very good at getting NA literature into the hands of those who need it. If a case arises where the best way for a home group to have literature they need is to print it themselves, permission to do so would typically promptly be granted.

Current Versions of Literature

The remainder of the suggested revisions to I*ntellectual Property Bulletin #1* are not changes to policy. We are recommending some copyediting changes as well as revisions to *IP Bulletin #1* to reflect policies that are already in effect.

One such policy is that the permission to quote or reproduce literature applies only to current versions of texts. We suggest adding the word *current* to clarify that the literature the bulletin



refers to is currently approved recovery literature. The reason for this change is straightforward: While NAWS holds the copyrights for all previously published editions, the World Board simply does not have the right to authorize the printing of previous editions of literature. NAWS is only authorized to publish currently approved recovery literature, so these are the only versions we can give someone else permission to reproduce.

Of course, members can use whatever editions they wish to in their personal recovery. But the conference decided in 1991 and reaffirmed in 2008 that only the most current edition of the Basic Text is approved for publication and sale by NA World Services.

In 1991, the WSC made the following statement and created it as policy:

> *The Basic Text, Fifth Edition, is the only edition of the Basic Text that is currently approved by the World Service Conference of Narcotics Anonymous for publication and sale. The World Service Office Board of Directors is entrusted with the responsibility for protecting the fellowship's physical and intellectual properties, including the Basic Text, and at the board of directors' discretion, shall take legal action to protect those rights against any and all persons who choose to infringe upon this literature trust.*

In 2008, after approving the Sixth Edition Basic Text, the WSC reaffirmed the decision that NAWS is only authorized to produce the current version of the Basic Text, adding this to the statement:

> *WSC 2008 approved the Sixth Edition Basic Text. It is now the only edition approved for NAWS production with the exceptions called out in the Translations Policy.*

Although the discussion of publishing earlier versions of the Basic Text has come up at several conferences, the conference has never approved their publication by NAWS. It doesn't make sense that the WSC would prevent NA World Services from producing these earlier versions but authorize groups to do so. We don't believe that adding *current* to *IP Bulletin #1* is a change in policy; we are recommending this change in order to clarify a policy that we believe has already been set by the WSC.

Online Posting of Literature

We also are recommending adding language to *IP Bulletin #1* to make it clear that permission does not extend to online or electronic versions of literature. This is another change we are suggesting so that the bulletin would better reflect policies that are already in effect. This is not a new policy, but, like the policy about current versions of literature, it has not been clearly articulated previously in *IP Bulletin #1*.

In the interest of protecting NA's intellectual property, we do not grant permission for anyone to post NA Fellowship-approved recovery literature online directly. Posting literature online is a

form of publishing. We have discussed this issue a number of times at the conference and reported about it repeatedly. NAWS posts IPs and booklets, in a variety of languages, on www.na.org, so that NA websites can directly link to this material, and members and virtual meetings have access. (Among the many great resources for virtual meetings posted at www.na.org/virtual is this slide that points members right to our literature.) We encourage anyone with questions about posting NA materials, including *Just for Today* or *A Spiritual Principle a Day*, to contact webmaster@na.org.

Other Proposed Changes

The rest of the changes we are recommending to *Intellectual Property Bulletin #1* are format and copyediting changes. We have revised the introduction and reorganized the document by moving the section on copyright so that it comes before the section on trademarks.

We have made a number of copyediting suggestions, such as consistently using the term *policy* throughout the document rather than using the term *guidelines* interchangeably with the term *policy*. Finally, we are suggesting some of the same sorts of changes we recommended for the Operational Guidelines to update the text to reflect current language, for example, using the term *service bodies* instead of *committees*.

Motion 3 **To approve the revisions to NA *Intellectual Property Bulletin #1* contained in Addendum D.**

Maker: World Board

Intent: To revise this bulletin so that it provides more direct and clear guidance, and so that it reflects current practices, terms, and language.

Financial Impact: None that can be anticipated at this time.

Policy Affected: Would replace the existing policy with Addendum C and with the changes reflected in Addendum D.

This bulletin has been largely rewritten. A clean copy of the bulletin with proposed revisions is contained in Addendum C. A copy tracking the proposed changes is included in Addendum D.

A summary of the proposed changes to *Intellectual Property Bulletin #1* includes:

- Permission would be required to reprint book-length pieces.
- Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats.
- The introduction has been rewritten and the section on copyright has been moved ahead of the section on trademarks.
- Some copyediting changes are suggested, such as using the term *policy* throughout the document, rather than a mix of *policy* and *guidelines*.

Virtual Meetings

NA meetings held by mail, phone, and online, collectively termed "virtual meetings," have existed for many years. Conversations at the WSC about online meetings date back to at least 1999, when a motion to "form a working group to explore the issues surrounding recognition of online meetings by World Services" was committed to the board at the 1999 WSC. As part of their response to the motion, the board acknowledged that "online meetings currently exist and seem to operate effectively without any official direction from the Fellowship." The next reference to the topic came in the "Moving Forward with a Common Vision" session at the close of WSC 2004 that featured two straw polls that were conducted following concerns raised by a regional delegate about listing online meetings on na.org. The results of those polls were as follows:

> Was it premature for NAWS to proceed with listing online meetings?
>
> Yes 39, No 21, Not Sure 11
>
> Do you want us to continue listing online meetings?
>
> Yes 30, No 22, Not Sure 21

In the absence of any clear consensus, online and phone-based meetings continued to be listed on na.org so that members could find these meetings, but NA World Services would not register them as groups without clearer direction.

World Services continued to get regular inquiries about the issue, but there appears to have been no discussion about virtual meetings at the level of the WSC until Proposal AL from Costa Rica was prioritized by conference participants for discussion during the New Idea Discussion sessions at WSC 2018:

> **Proposal AL:** To direct the World Board to create a project plan for creation of the "NA virtual group and service guide."

When participants separated into small groups to discuss the new idea proposals, the majority suggested that there was a need to recognize online meetings as legitimate, and several shared that virtual groups are already included on their regional meetings lists and participating in NA services in their communities alongside in-person meetings. An open webinar was held in September 2019 to discuss best practices for virtual meetings and how they interface with the NA service system.

The global shutdown beginning in March 2020 saw much of NA dramatically shift to holding meetings online almost overnight and highlighted the need for service material for virtual meetings. The Local Service Toolbox Project was well positioned to answer that need. The 2020 WSC approved the project for another conference cycle and overwhelmingly selected virtual meetings as its focus:

> **Vote:** To accept two topics as our beginning focus for the Local Service Toolbox project – online meetings best practices and carrying the NA message effectively and virtually.
>
> Maker: World Board
>
> Decision: Yes 127, No 2, Abstention 1, Present not voting 3
>
> Passed with 98% Consensus Support

The first step NAWS took in response to the Fellowship's need was creating a new webpage, www.na.org/virtual, which contains resources developed both locally and by NA World Services. Using this material as a starting point, we continued to gather experience in a number of ways:

- Members, groups, and service bodies from around the world shared their experience with virtual meetings and service delivery in five web meetings open to the entire Fellowship between July 2020 and July 2022.
- Three surveys were posted in multiple languages between October 2020 and December 2021 to gather input on the content of a new service tool for virtual meetings, and to review early drafts.
- Experienced members were bought together for more in-depth conversations in a series of meetings held at different times to accommodate all time zones.

After this lengthy process was completed, *Virtual Meeting Basics* was posted online as board-approved service material at www.na.org/basics.

In the midst of all this discussion, drafting, and revision of the new service tool, we included the following question in a Fellowship survey posted from March through May 2021:

> Do you believe that virtual meetings meet the criteria to be NA groups, as listed in *The Group Booklet*?

A total of 4,230 members, groups, and service bodies from 62 countries responded to the survey. There was a consensus among respondents that virtual meetings do meet the criteria: Yes 3,466 (82%), No 407 (10%), and Not Sure 357 (8%). We asked the same question in a conference participant web meeting in October 2021 and got almost identical results: Yes 81 (81%), No 9 (9%), Not Sure 10 (10%).

The World Board reported these results in the July 2021 issue of *NAWS News* and further explained:

> Just a reminder: virtual meetings are listed in the NA meeting finder (search using "web" or "phone" for country), and each service body is free to make their own decisions about member groups (or areas or regions). The question of whether to recognize virtual meetings as groups at NA World Services is a different type of decision that must be made by the NA Fellowship as given voice by the regional and zonal delegates at the World Service Conference. This does not and should not affect local decisions by service bodies to recognize these meetings as groups.

This motion could be seen as late in certain regions, where online meetings have already become a part of life, and potentially scary to others, for whom in-person meetings are all they've known. The World Board has a responsibility to respond to new technological developments in harmony with the Fellowship and our guiding principles, so that the NA message can clearly and successfully reach as many still-suffering addicts as possible. This response comes from that desire and in that spirit.

Motion 4 **To acknowledge that an NA meeting that meets regularly in person or virtually can choose to be an NA group if they meet the criteria described in *The Group Booklet*, including the six points for an NA group, and are consistent with NA philosophy as expressed in our Traditions. *(Footnotes will be added to* The Group Booklet *and* GLS, *reflecting the decision of the WSC, if this motion passes, and referencing* Virtual Meeting Basics *as a possible resource.)***

Maker: World Board

Intent: To recognize NA groups that meet virtually, including online and by phone.

Policy Affected: None as this creates new policy.

Their Own Language and Culture

We are offering two motions in this *CAR* intended to help all members and potential members see themselves in NA literature and service material. The first motion concerns A Vision for NA Service, and the second is about local personal stories in the Little White Book and Basic Text.

A Vision for NA Service

A Vision for NA Service is printed inside every *Conference Agenda Report*, and it is read or displayed during many service body meetings. It hangs on the wall behind the front desk of the World Service Office, greeting people as they walk through the doors. Our vision is a lodestar for NA service. We are suggesting a small revision that would have a large impact on many members. Motion #5 below recommends that the phrase "his or her own language and culture" be revised to read "their own language and culture." As a result, the first bullet point of the vision would read "Every addict in the world has a chance to experience our message in their own language and culture."

It's important that the statement that sets our intentions casts as wide a net as possible and includes all members and potential members. The suggested change would be in service of that inclusivity.

There is a regional motion later in this report calling for a project plan "to investigate changes and/or additional wording to NA literature from gender specific language to gender neutral and inclusive language." A Vision for NA Service is not NA literature, however, and so it would not be within the scope of such a project if the motion were to pass.

Gender and language in NA literature is a large issue, and we hope the conference decides to take up that conversation on a broad scale, through an Issue Discussion Topic in the cycle ahead and a project in the cycle to follow. In the meantime, the vision statement is a distinct piece that can be addressed regardless of any decisions the Fellowship makes or doesn't make about NA literature.

Given the size of this *CAR* (25 motions) and the challenges of the WSC, we urged participants to hold off on making motions if possible. This will be the first in-person conference in five years, and it's likely to be our most hybrid WSC ever. The more *CAR* motions there are, the tougher it will be to get through business. In light of that, we weren't sure whether to include this motion in the 2023 *CAR*. We decided to ask conference participants via survey, and the consensus of those who responded was yes—include the motion. So here we are.

Survey Question and Results

Should the World Board offer a motion in the 2023 *CAR* to revise A Vision for NA Service to be more inclusive to all members: specifically, changing the phrase "his or her own language and culture" to the phrase "their own language and culture." If that change were made, the first bullet point of the vision would read "every addict in the world has a chance to experience our message in their own language and culture."

yes	no	abstain	present not voting
93	13	6	4
83%	12%	5%	

If this motion passes, A Vision for NA Service would be revised wherever it appears. The Vision in its entirety is printed inside the front material of our most recent books and in much service material. The bullet point the motion seeks to revise is also quoted in the "In Service" section of *Guiding Principles*, Tradition Six. We would sell off the existing stock we have of all affected material and make the revisions when it is time to reprint materials.

Motion 5 **To revise A Vision for NA Service, changing the phrase "his or her own language and culture" to the phrase "their own language and culture."** ***(If this motion passes, A Vision for NA Service will be revised in future printings, including in Fellowship-approved recovery literature.)***

Maker: World Board

Intent: To revise the Vision Statement to be more inclusive.

Policy Affected: If this motion is adopted, A Vision for NA Service would be updated wherever it appears in service material and Fellowship-approved recovery literature. In addition, the reference in *Guiding Principles* shown below will be revised as shown. We will deplete existing stock of service material and recovery literature, and revise in future printings.

A Vision for NA Service

All of the efforts of Narcotics Anonymous are inspired by the primary purpose of our groups. Upon this common ground we stand committed.

Our vision is that one day:

- Every addict in the world has the chance to experience our message in ~~his or her~~ their own language and culture and find the opportunity for a new way of life;
- Every member, inspired by the gift of recovery, experiences spiritual growth and fulfillment through service;
- NA service bodies worldwide work together in a spirit of unity and cooperation to support the groups in carrying our message of recovery;
- Narcotics Anonymous has universal recognition and respect as a viable program of recovery.

Honesty, trust, and goodwill are the foundation of our service efforts, all of which rely upon the guidance of a loving Higher Power.

***Guiding Principles*, "Tradition Six," In Service:**

"A Vision for NA Service says that we aspire to a time when 'every addict in the world has the chance to experience our message in ~~his or her~~ their own language and culture and find the opportunity for a new way of life.'"

Personal Stories

The second motion in this section of the *CAR* is motivated by the vision statement, which states that "every addict in the world has the chance to experience our message in his or her own language and culture." (See the preceding motion for a suggested revision to this language.) One of the ways addicts experience our message in their language and culture is through stories. Personal stories appear in two places in NA literature. The Basic Text contains a global collection of personal experience in the "Our Members Share" section of the book, and the Little White Book contains stories as well.

Motion #6 originated with a request from the German Speaking Region to have local stories in the German-language Basic Text. Our current translation policy allows communities "with a history of successful translation efforts" to publish local stories in the Little White Book. If a community wishes to develop stories, they reach out to the World Board. World Services guides them through the process, and the board approves the final versions before publication. Currently 13 versions of the Little White Book have local personal stories. (You can find English-language versions of all of these local stories in the **60th Anniversary Edition of the Little White Book**.)

With that in mind, when the German Speaking Region approached the World Board with their request, the board suggested an alternative solution: that communities with stories in the Little White Book be allowed to publish those stories in their language version of the Basic Text.

When members can see their language and culture reflected in NA literature, it helps them identify. The collection of experience in the Sixth Edition Basic Text is already broad, and many of us see ourselves in those pages. A section of stories originally written in a member's own language and more closely reflecting their culture will help even more addicts identify and know they are home. After a conversation with the German Speaking Regional Delegate, we agreed that the change in translation policy outlined below would carry the message to more addicts and bring the future spoken of in the vision statement closer.

We encourage conference participants to reach out to the board with concerns or ideas for improvement. In some cases, we may be able to reach a resolution without the use of a motion, as we did in two instances this cycle (see page 46 for more information). In this case, the only way to include local stories in the Basic Text would be through a change to the translation policy, and we agreed to make a motion in the *CAR*.

We are recommending that communities be allowed to include up to six of their locally developed stories, previously published in their Little White Book, in a section of their translated Sixth Edition Basic Text, if they wish to do so. Limiting the number seemed wise to ease the burden on production and translation efforts. Some translated versions of the Basic Text are substantially longer than the English-language version. Six is the number of stories in the Beginnings section of "Our Members Share" in the Basic Text, so that seemed like a logical number. There is already clear policy about the approval of Little White Book stories in *GWSNA*.

The motion below includes the introductory language that would be added to that section of stories in the Basic Text. The text in square brackets would change for each language version of the Basic Text.

Motion 6 **To approve a change to World Services Translation Policy in *GWSNA* to allow the possibility for up to six locally developed personal stories to be included in translated Sixth Edition Basic Texts, if the stories have first been published in the Little White Book of that language. These stories would be placed in their own section in Our Members Share with the following language preceding them:**

A Vision for NA Service looks forward to a day when addicts around the world have the opportunity to experience our message in their own language and culture. In pursuit of that vision, communities or language groups that have published local stories in the Little White Book may include up to six of those stories in the Basic Text if they choose. These [fill in the number] *stories were originally published in the* [fill in the language] *Little White Book in* [fill in the year].

Maker: World Board

Intent: To better reflect our Vision that "every addict in the world has the chance to experience our message in [their] own language and culture . . ." in our primary text.

Policy Affected: *A Guide to World Services in NA*, page 42:

Basic Text and Little White Book Personal Stories

~~Our experience has shown that creating, collecting, and approving personal stories is a difficult task.~~ With the adoption of the Sixth Edition Basic Text, we now have a collection of personal stories that reflects the global nature of the Narcotics Anonymous Fellowship. The personal stories in the Basic Text communicate the NA message to those who are looking for help, to NA members, and to anyone who picks up a Basic Text. Because of the ~~difficulty we have seen with local development of~~ global nature of the Sixth Edition personal stories, we believe that only the stories approved by the Fellowship in the Sixth Edition, either in their entirety or a selection of them, should appear in translated versions of the Basic Text. The only exception is the Little White Book stories noted below.

Our experience has shown that creating, collecting, and approving personal stories is a difficult task. If a local NA community with a history of successful translation efforts wishes to develop local stories, they may do so for the Little White Book. We ask that these communities contact NA World Services before they begin this process so that we can work together in the process of creation and approval. We hope that this communication will help to minimize some of the issues we have had with approving personal stories sent to us in the past.

Local communities or language groups that have stories published in the Little White Book may choose up to six of them for inclusion in their Sixth Edition Basic Text. These stories will be published in a clearly identified section of the Basic Text.

Existing translations of the Basic Text are not affected by this change. We will continue to publish translated Fifth Edition versions of the Basic Text until the local community has translated and signed off on the new material in the Sixth Edition for publishing. These versions now include a variety of material, from no personal stories to some selection of Fifth Edition personal stories, to locally developed and World Board–approved local stories. These versions will continue to be published as Fifth Edition Basic Texts. NA communities that wish to have the first ten chapters now titled "Our Program" published while they work on translating some or all of the Sixth Edition personal stories will continue to be able to do so. These partial translations would also be published as Fifth Edition Basic Texts.

Trusted Servant Term Lengths

The shutdowns from the pandemic disrupted NA in countless ways, sometimes with positive results: Service bodies have learned to do things in new ways, and NA has reached many addicts online who otherwise might not have heard the message. As with most crises, however, there is cleanup to do in the wake of the pandemic. The next two motions both fall into that category.

Six board members' terms are set to expire in 2024, which will be in the middle of a conference cycle. Motion #7 asks to extend their terms until the end of the conference cycle. The World Board is responsible for overseeing the work of the WSC, and it doesn't make sense for board members' terms to expire mid-cycle.

Motion #7 is similar to a motion that passed with unanimous support at the interim WSC meeting in 2022. In both cases, motions were offered so that board members' terms did not expire in the middle of the conference cycle. World Board members are elected to six-year terms and are eligible to serve for two terms. Under ordinary circumstances, that means that at any given WSC some board members' terms might be ending and there would be elections for new board members.

With the disruptions in the pandemic, the conference cycle that is drawing to a close was extended a year. At the interim meeting in 2022, participants opted to extend the terms of three board members one year accordingly. The terms of those three board members were set to expire in 2022, which was not the end of the cycle. Now their terms will expire in 2023.

We face a similar dilemma now, with six more board members' terms set to expire in the middle of a conference cycle. The end of the upcoming conference cycle will either be 2025 or 2026, depending on conference decisions. Motion #9 in this *CAR* seeks to change the conference cycle length from two to three years. Depending on the disposition of Motion #9, passing Motion #7 would extend the terms of the six board members affected to 2025 or 2026. In order to avoid board members' terms ending mid-cycle, Motion #7 is necessary regardless of the decision made in Motion #9 about cycle length.

Motion #7 does not change any policy or ask for any ongoing changes. It is merely asking to adjust the terms of the six board members to accommodate the current disruption in the WSC cycle. Many service bodies have had to make changes in elections and other cyclical work in order to adapt to the disruption that has already occurred in the WSC cycle.

After this WSC, another adjustment to board member terms may need to be made to avoid board members' terms expiring mid-cycle. It's impractical to try to make those decisions until the conference makes a decision about WSC cycle length. If no other decisions are made to the contrary, after WSC 2023 the conference will resume a two-year cycle, with the following meeting happening in 2025. All of the WSC-elected trusted servants currently serving have terms that expire in even years to synchronize with an even-year conference cycle, so the WSC will need to address that discrepancy in future decisions. Alternatively, if the conference decides to try a three-year cycle for two cycles, the board members currently serving will have terms that expire at the close of a conference cycle.

Motion 7 **To extend the six World Board members' terms currently expiring in 2024 through the end of the upcoming World Service Conference cycle.**

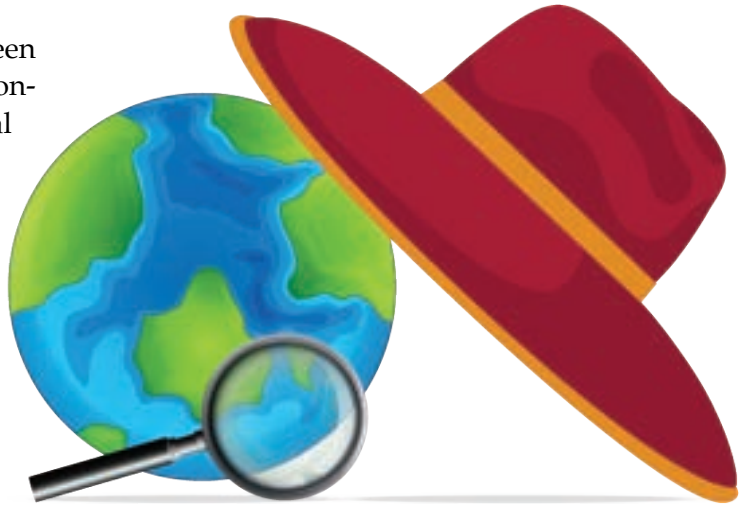
Maker: World Board

Intent: To accommodate the change to the WSC cycle that has already occurred and avoid World Board terms ending in the middle of a conference cycle.

Policy Affected: None

Where in the World Is WCNA?

The conference isn't the only event that has been disrupted by the pandemic. The World Convention has also been unsettled by the global closures and unpredictability of the last few years. We are currently planning WCNA 38, which will take place in Washington, DC, in 2024. We are not certain of what is possible after that, however, and Motion #8 asks the Fellowship to put the convention rotation policy on hold to allow the board and the conference to determine what is possible and practical.



The Pandemic Years

WCNA 38 was originally to be held in Melbourne, Australia, in September 2021. As much as a year prior to that, we were concerned about the viability of the event, given health considerations and the travel restrictions that were being imposed throughout the world. We reported about our uncertainty, and then we were able to reschedule the contract at the convention center for November 2022. One of the challenges in planning a World Convention is, given the size and scope of the event, we need to finalize contracts well in advance of the event. During the height of the pandemic, things were so uncertain that it was impossible to predict what the world might look like at the time of the event. We had until October 2021 to make a final, firm decision about the Melbourne contract. After that, we would incur a penalty for canceling. We received a lot of feedback from members. Some urged us to hold the convention no matter what. Some urged us to cancel and wait until the global health and travel situation was more stable to try to plan a convention.

In the end, for the first time in our history, we had to cancel a World Convention. We felt canceling the Melbourne contract was the most responsible way forward, and we announced that to the Fellowship in October 2021, the last month to cancel without penalty. We explained that we were heartbroken to have to cancel but that we were not able to plan WCNA for Melbourne with any certainty that we could have a proper World Convention, one in which members from around the globe attend and are able to have a real WCNA experience. (If you've ever been to a World Convention, you know—there's nothing else like it!)

From the October 2021 NAWS Update email to the Fellowship:

> COVID has flipped our entire world upside down, and WCNA-38 has been no exception. We were hoping beyond hope that we could make it happen but that is not the case. NAWS' financial and human resources continue to be strained. We are slowly building back thanks to the help of member contributions, but that progress is gradual and not always predictable.

2024

Happily, we do have a 38th World Convention on the horizon. WCNA will return to Washington, DC, 29 August to 1 September 2024. The dinosaurs among us might remember WCNA 15 was in DC almost 40 years before that: Unified and Staying Alive in '85.

The convention in DC promises to be epic. If you want to stay updated on those plans, the best thing to do is subscribe to *NAWS News*, *Just for Today*, or *A Spiritual Principle a Day*: **www.na.org/subscribe**. That will ensure you also receive NAWS Update emails.

And Then What?

A Guide to World Services in NA, which is posted on www.na.org/conference, has a section devoted to the World Convention Guidelines that includes a rotation plan (pages 47–49). But of course, that policy doesn't contain guidance for what to do when the entire world goes topsy-turvy, a convention gets canceled, and the expense of event planning gets ratcheted up dramatically.

Honestly, we don't know what the possibilities are for the World Convention after 2024. Given the missed convention in the Asia Pacific convention zone, the increased costs of event planning in many parts of the world, NA World Services' reduced income and staff, and the uncertainty about the conference cycle, it will take time and research to determine what is possible and practical. Motion #8 below is asking the conference to set aside the convention rotation policy after 2024 so that we can make decisions together when we have more information to consider. The final approval will be up to conference participants.

Motion 8 **As a result of the COVID pandemic, to suspend the World Convention of NA (WCNA) rotation policy after 2024, to allow the World Board to determine what is possible and practical moving forward and then seek approval from conference participants.**

Maker: World Board

Intent: Given the disruption in the rotation of WSC and WCNA that has already occurred, the increases in event costs, and the other changes brought about by the pandemic, to allow an evaluation by the World Board and approval by conference participants for what is possible and practical in the future.

Policy Affected: If this motion is adopted, a note would be added to the policy listed below that this Rotation Plan is suspended until a new decision can be made.

***A Guide to World Services in NA*, page 47:**

World Convention Guidelines

World Convention Zone Rotation Plan

Historically, the World Convention has usually been held the first weekend in September, which is the Labor Day holiday weekend in the USA. However, the World Board retains the right to set the date of the World Convention as appropriate. WCNA will be held every three years.

Year	Zone	Actual Site
2021	Asia, Middle East, and Africa	Melbourne, Australia TBD
Note: WCNA 38 will not take place in 2021 because of the impact of the pandemic. We are working on rescheduling WCNA 38 for 2022.		
2024	North America	Washington, DC 29 August–1 September 2024
2027	Europe	
2030	North America	
2033	Central and South America	

The current rotation plan will either continue or a new rotation plan will be presented to the conference in sufficient time for planning for the site of the 2036 World Convention.

There are zones in North America, Asia-Pacific-Middle East-Africa, Europe, and Central and South America. Rotation for WCNA is based on every other convention being held outside of North America.

Future of the WSC

The World Board and other conference participants have had many discussions about what's next for the World Service Conference. This cycle alone there have been conference participant webinars dedicated to the subject, a survey that delegates responded to, and a few sessions on the topic at the partial, interim WSC in April 2022. These conversations have helped shape some recommendations from the board. We are offering four motions related to what we've been calling the Future of the WSC.

- ✓ Motion #9 is to try a three-year WSC cycle.

The next two motions will only be offered if #9 passes.

- ✓ Motion #10 is to hold an interim, virtual WSC between in-person meetings.
- ✓ Motion #11 is to post the *CAR* six months before the in-person WSC.
- ✓ Motion #12 is to make delegate funding available upon request rather than automatic.

These are just a starting place for change—the first steps in building a new, more effective WSC together.

Background

We have been talking about the Future of the WSC for many years (decades, in fact). We've had discussions at the WSC; discussions between conferences during web meetings; projects and workgroups devoted to the topic; many World Board sessions; and conversations, motions, and projects in the 1990s and earlier, before the board even existed.

You may be relieved to hear that we are not going to do a deep dive into that history here. We do, however, provide a bit of background in the PowerPoint linked to the above. If you are interested in reading more about the ideas and discussions that have led to Motions #9–#12, please see the Future of the WSC PowerPoint and the other resources posted in the Future of the WSC section on www.na.org/conference.

Several concerns have motivated the conversations about changes to the WSC through the years. As NA grows, the conference has grown—in size and expense. And as the WSC gets larger, some would say it becomes less effective or it takes more time and attention to maintain its effectiveness. We've been cautioning for a while that business as usual is not sustainable, and then the universe obliged, and almost nothing was "business as usual" anymore.

Let Go, or Be Dragged

The pandemic thrust change on most of NA. In-person groups started meeting virtually. Conventions and events were postponed. Service bodies, including the World Service Conference, adapted to meeting online. We are currently in the final year of a three-year conference cycle—

Want a more graphical journey through much of this information?

Check out the Future of the WSC PowerPoint on www.na.org/conference.

the first in our history. We have two virtual WSC meetings under our belt—the first two in our history. (For more on WSC 2020 and the interim virtual WSC 2022, see the introduction to this *CAR*, p. 2.) We have learned so much, throughout all of NA service, and we are primed for a purposeful rethinking of the WSC. The future is upon us.

The conditions of the past two years have forced World Services to adapt. If you have a NAWS subscription of any kind or have been to our quarterly open webinars, you may know that the global shutdowns plunged World Services into a financial crisis. We are recovering, but we will never be the same again—for better and for worse.

Resources related to the World Board have been scaled back. The board has been meeting virtually throughout the pandemic, and met in person for the first time in more than two years in July 2022. We are budgeting for two in-person board meetings a year in the cycle ahead. In past cycles, there were three or four each year.

At the onset of the pandemic we had to lay off or furlough more than half the staff. Because there are fewer staff, some of the work hasn't gotten done. We are working on WSC projects when resources permit, thanks to the flexible approach to projects approved at WSC 2020. A Spiritual Principle a Day workgroup met virtually from the start of the pandemic. We haven't published *The NA Way* and *Reaching Out* in years. Due to the reduction in staff and the need to reduce printing and shipping costs, all printed reports are now posted electronically. We are currently struggling to catch up with database entries and translation projects. We are grateful to have been able to bring back some furloughed staff and have recently filled some new openings, but we are nowhere near pre-pandemic staffing levels. The Chatsworth office has 29 staff as of this writing, about two-thirds of where we were a few years ago.

The WSC is the last piece of the World Services system to reduce its resource allocation to align with the current circumstances. The conference, and the season leading up to it, requires a lot of human and financial resources. It cost around a half million US dollars to hold the in-person WSC in 2018, and 2023 will likely cost more money than in the past. Since that time, five regions and six zones have been seated at the WSC, adding a potential of 22 more participants in the room. Airfares and hotel costs have increased, and technology costs may also rise as more participants join virtually.

We now have 142 conference participants: 123 regions, 6 zones, and 13 World Board members. With alternates, that's a potential for 271 seats. Plus there are WSC Cofacilitators, Human Resource Panel members, staff, and interpreters. The meeting is translated into five to eight languages, depending on the needs of the participants. In short, it is a resource-intensive activity—the conference itself and the months leading up to it. It takes up a lot of bandwidth, and we have talked for years about how to improve the processes so that the WSC can be more nimble, efficient, and responsive.

A three-year cycle will allow us to allocate some of those resources to NA Fellowship development worldwide. Some of the resources that would otherwise go to *CAR* workshops and decision making would be freed up. That amounts to more time to actually do the work that supports our groups in carrying the message. This has certainly been the case for World Services during this, our first three-year cycle—more on what we've gotten done below—and we believe it would be the same for many regions, areas, and zones that spend a lot of time and effort on WSC-related activity.

It's not a zero-sum game, but there is only so much time, money, and energy, and if we're spending less of it preparing for a conference, we can spend more of it growing NA. As the Introduction to our Basic Text reminds us:

> *Everything that occurs in the course of NA service must be motivated by the desire to more successfully carry the message of recovery to the addict who still suffers. It was for this reason that we began this work. We must always remember that as individual members, groups and service committees, we are not and should never be in competition with each other. We work separately and together to help the newcomer and for our common good.*

A Three-Year Cycle

The board is recommending trying a three-year conference cycle for two cycles—from 2023 to 2029.

A three-year cycle may sound like a radical change to some, but the reality is that we are living through a three-year cycle right now. In many respects it already feels like an improvement. Along with the hardships of the past few years, there have been many gifts. Some of them may have been overshadowed by the challenges at first, but they were gifts, nonetheless.

Communication among conference participants, including the board, is more robust than ever in our history, and that will continue. We have conference participant web meetings every other month (sometimes even more frequently). The board sends participants more frequent email updates than ever before, and participants have access to detailed financial updates every two months.

We learned that we can meet online as a conference, and we can make decisions virtually. Delegates were able to choose what to address at the virtual WSC meetings, giving them more control over the agenda than ever before. The conference approved policies to continue to meet and make decisions virtually, as needed. We are now able to survey and e-poll in advance so the conference can take care of some business before and after we meet.

World Services' focus has been broader, partly because of the three-year cycle. We never imagined being able to do what we have done in the last three years. When we stretch the canvas, we can paint more upon it. Despite greatly reduced staffing levels, we've been able to:

- Hold quarterly, open webinars on topics important to the Fellowship: **www.na.org/webinar**.
- Hold conference participant web meetings every other month.
- Publish more translated material than ever, and get caught up on posting already-published IPs and booklets in 57 languages.
- Finish a book project, accomplishing workgroup tasks virtually that we typically do in person.
- Launch two Instagram accounts, **@narcoticsanonymous** and **@naglobalevents**.
- Upgrade our database.
- Build consensus on ideas about virtual meetings and material to support them through open surveys, web meetings, and discussions with conference participants.
- Publish *Virtual Meeting Basics* and post many other resources to support virtual meetings all on a new page: **www.na.org/virtual**.
- Increase access to NA literature for incarcerated people through agreements to load NA literature on tablets in a number of correctional facilities—with more in process.
- Hold a six-month Fellowship review for the first change to the *Fellowship Intellectual Property Trust*, which is captured in Motion #1 in this *CAR*.

- Post audio versions of the Basic Text for free streaming or download in eight languages on www.na.org/audio.
- Survey the Fellowship for revisions to *The Loner* IP and a possible new piece of recovery literature on drug-replacement therapy and medication-assisted treatment as it relates to NA.

That's just *some* of the work we've accomplished.

The point is that because of the extended time between in-person WSCs, we've been able to focus more attention on work that directly carries the message to the addict who still suffers. The conference is extremely important, but it can feel far removed from the life of the incarcerated addict who is reading *Welcome to Narcotics Anonymous* on a tablet or the member in Thailand who is able to listen to the audio Basic Text for free in their language. When we are not head-down in preparing for and administering the conference, we have more time and energy for other things. And that's true throughout the NA service system.

A longer cycle allows for more Fellowship development, public relations, H&I, and more—for World Services, and for regions, zones, and local service bodies throughout NA. We believe the service system as a whole can benefit from a longer cycle. This is not just about what would be best for World Services.

As we've said many times, the decision to try a three-year cycle would just be the start, a beginning. With communication throughout the cycle and the help of a workgroup to frame ideas, we anticipate the conference would come to consensus about many other improvements as well.

A World of Possibilities

We surveyed conference participants and had many discussions about how to improve the WSC and conference cycle. Some of the ideas that came up repeatedly include:

- Help participants disseminate information and build relationships within their regions and zones.
- Develop processes for the body to build the *CAR* together, including mechanisms for delegates to prioritize, process, or vet motions. Work toward better handling and processing of *CAR* motions.

- Focus on what needs to be done in person and what can be done effectively virtually. Make decisions on some "old business" items virtually before the in-person WSC meeting so that the time together can be focused on the cycle ahead.
- Incorporate WCNA into the work of the conference cycle in some way, since the two events, the conference and convention, would both be on three-year cycles.
- Build more-inclusive planning processes. Evolve the WSC into a planning conference with more training, mentorship, and conversation. Strengthen the strategic plan "feedback loop" to help amplify the voices, role, and participation of participants and members.
- Improve collaboration with zones to accomplish the projects that are prioritized and approved by the WSC. Use zones to collect ideas and help develop the work.

So much of what we have heard is about how we use our time between conferences. This is just a sampling of the ideas that have been shared to give you a sense of the texture of the conversations and some of what excites us about the prospect of a three-year cycle.

A three-year cycle seems to allow for more opportunities to really improve some of the WSC processes. It would provide more time for collaborative planning and for the discussions that help shape future work.

Many conference participants suggested a workgroup to help frame ideas for discussion about what a transformed WSC and a three-year cycle might look like. We intend to offer a plan for a project in the Conference Approval Track material that would utilize a virtual workgroup. We are asking each zone to select a member for the workgroup, which worked well for the WSC of the Future workgroup in the 2018–2020 cycle

and will ensure a geographically diverse group selected by delegates.

The ideas expressed here are just a start, and we can create a better future together in the cycles ahead. Adapting to the conditions of the pandemic has increased our capacity to imagine a different future.

Embracing Change

One of the most frequent concerns we have heard is about regional and zonal delegate term lengths. Trusted servant terms would lengthen if the conference cycle lengthens. That would not be the case for the World Board because board member term lengths are six years, and six is just as easily divisible by three as by two. At regions and zones, however, the situation is different.

When the conference cycle doubled from one year to two there were similar concerns, and NA adapted. We have heard a number of ideas from members about how service bodies might again adapt if the WSC decides to try a longer cycle. Some regions that currently have policy to elect an AD and RD for two terms in a row may decide that one three-year term is sufficient, in which case the commitment would be reduced from eight years total to six years. Some regions and zones may want to discuss ways to assist the delegates in some aspects of their role. Perhaps a team of people could assist with workshops, for instance. Perhaps regions and zones could collaborate more with virtual workshops. The decisions are up to each service body to make, depending on their needs; the point is that creative ideas are already circulating. It's our hope that some of the changes in a new WSC and conference cycle will make the delegate position attractive to more members and encourage more members to get involved in service. Part of the benefit of a two-cycle trial period is that it gives us all a chance to try new things and see if this is workable. Then at WSC 2029, a decision will need to be made as to whether to adopt a three-year cycle on an ongoing basis.

No matter what happens, the conference cycle will change after 2023. If nothing is decided at WSC 2023, the following conference will be in 2025, effectively shifting the cycle so that the WSC happens every odd year. That is a big change in the cycle relative to how most service bodies think about and elect their delegates.

None of us is likely to be resolute about changes because no one can see the future. Making decisions such as the ones suggested here takes a leap of faith. We don't have all of the answers, but we are confident we will find our way into the future together, as a conference. Change was delivered into our lap; let's surf the wave.

"When we accept the possibility that we can get infinitely better—that there is no end to what recovery has to offer—we begin to understand that spirituality is not just a way out. It is a way of life that will continue to bring us new gifts, new possibilities, and new awareness as long as we practice it. If we allow ourselves to be motivated not by fear of the past but by hope for the future, we are as excited to move forward when life is good as we are when we are struggling."

Living Clean, Chapter One, "Why We Stay"

Motion 9 **To approve a three-year World Service Conference cycle on a trial basis following WSC 2023 through WSC 2029. Following 2029, the WSC cycle would return to two years, unless another decision is made.**

Maker: World Board

Intent: To put into practice some of what we've learned during the pandemic so that we can shift more resources to work that more directly carries the message. This would bring the WSC resource allocation in line with other changes that have been made in World Services—cuts in staff levels and a 50% reduction in in-person board meetings.

Policy Affected: If this motion is adopted, a footnote would be added to *GWSNA* about this trial. References to *biennial* and *two year* would be changed. Examples are included below to give a sense of the changes throughout. All of the changes will be included in the draft of *GWSNA* distributed to conference participants for review early in the cycle after WSC 2023.

Guide to World Services in NA

World Service Conference

Page 2

The final part of our service structure is the World Service Conference (WSC). It is the nerve center of our Fellowship. Our Conference is both an entity and an event; it is where all of our world services come together to exchange ideas and have discussions. Those discussions happen at the ~~biennial~~, in-person meeting and through virtual and in-person discussions throughout the ~~two-year~~ conference cycle.

Page 7

That vision continues. In each ~~biennial~~ meeting of the World Service Conference, and through all of the work participants do as a Conference throughout the cycle, our Fellowship comes together to share experience, strength, and hope; to build relationships; and to fellowship and serve with NA members from around the world.

The ~~Biennial~~ Meeting of the World Service Conference

Page 8

The World Service Conference is held in person every ~~two~~ three years with virtual meetings scheduled mid-cycle.

The Conference Report

Page 19

The *Conference Report* is released immediately before each in-person World Service Conference. It contains information to conference participants about the activities of World Services in order to help them prepare for the ~~biennial~~ meeting.

Interim Virtual Meeting

As we've said, we are currently experiencing the first three-year conference cycle. One of the features of this cycle was an interim decision-making meeting. The interim meeting was virtual and partial—not a full, week-long WSC. Among other things, at the interim meeting the conference passed a budget to cover the last year of the cycle and had small-group discussions that helped frame these motions on the future of the WSC.

We are suggesting that if the WSC decides to try a three-year cycle, midway or two years into the three-year cycle, an interim virtual meeting would be held to decide on issues selected by conference participants. This is an idea many conference participants have expressed enthusiasm for. We would build on our shared experience with an interim, virtual WSC meeting. Conference participants can determine via survey in advance of the meeting what items to address. The report with the interim items for decision would be released on the same schedule the CAT is on currently, which is 90 days in advance of the meeting.

Motion 10 **If Motion 9 is adopted, to approve an interim virtual WSC in the middle of the conference cycle for decisions that are legally necessary and those that conference participants choose to address. As was done in the 2020–2023 cycle, material would be posted on na.org under the same deadline policies as the CAT (90 days prior) and all voting conference participants would be polled to choose the items they wish to address.**

Maker: World Board

Intent: To allow conference participants to address some WSC business between in-person conference meetings.

Policy Affected: None.

CAR Publication Date

The other improvement a three-year cycle allows is an earlier release date for the *Conference Agenda Report*. If Motion #11 passes, the English-language *CAR* for the in-person WSC would be posted six months (180 days) prior to the meeting, with the translated versions posted a month later. This would be 30 days earlier than policy currently requires.

For many, the *CAR* comes out at the beginning of a long holiday season. That can make it challenging to launch *CAR* workshops and inform members. Being able to release the *CAR* a month earlier would make a substantial difference. It would give delegates more breathing room before the holidays begin and avoid some of the crunch created because the US holiday season is right on top of the current publication dates.

As you see in the Policy Affected section below, passing this motion would also remove the details in *A Guide to World Services in NA* about how the *CAR* is distributed and state that, at a minimum, it will be posted and available at no cost to members on na.org. Since the onset of the pandemic, we have posted electronic versions of reports on na.org and in a Dropbox for conference participants rather than mailing paper copies. The largest part of our expenses for paper publications in the past has been translations and mailing. We plan to continue to translate into the languages we have resources for but not to mail. This has worked well for the past three years and seems like the most prudent approach, particularly with the costs of paper and shipping increasing so dramatically.

Motion 11 **If Motion 9 is adopted, to approve a change to the release of the *Conference Agenda Report* (*CAR*) to be thirty days earlier than the current policy of 150 days prior to the start of the World Service Conference. The new *CAR* release day would be 180 days prior to the in-person WSC meeting for English, 150 days for translated versions. The deadline for the finalization of regional and zonal motions would be 270 days. The *Conference Agenda Report* will be posted on na.org at no cost to members.**

Maker: World Board

Intent: To release the *CAR* earlier to allow more time for its review.

Policy Affected:

***A Guide to World Services in NA*, page 19:**

The *Conference Agenda Report* (*CAR*)

The *Conference Agenda Report* is distributed a minimum of one hundred and ~~fifty~~ eighty (1~~5~~80) days prior to the opening day of the conference, with translated versions released a minimum of one hundred and ~~twenty~~ fifty (1~~2~~50) days prior. The amount of material translated can vary, but minimally the front portion of the *CAR* (which contains the reports, proposals, and motions before the conference) is translated into as many languages as possible. The report contains the proposals and motions that the Fellowship is being asked to consider and form a fellowship-wide group conscience on. ~~One copy of the report is mailed to each voting participant of the conference, each alternate, zonal contacts, and the mailing address of each region and zone. NA members may purchase additional copies from the WSO. The price established for the report may vary depending on the cost of production and distribution.~~ At a minimum, the *CAR* will be posted at no cost to members on na.org. The *Conference Agenda Report* also includes an easy-to-read glossary of terms.

The *Conference Agenda Report* includes items for fellowship discussion and decision, including reports, proposals, and motions from the World Board and any motions submitted from regions or zones. (Regional and zonal motions will be included in their own section and have the same number or letter when presented on the conference floor.) Regional and zonal motions for inclusion in the *CAR* must be submitted two hundred and ~~forty~~ seventy (2~~4~~70) days prior to the opening of the conference. All motions will include a written intent. Regions and zones should briefly (in approximately 250 words) describe the reasoning behind, and consequences of, their regional or zonal motions in the *Conference Agenda Report*. The World Board also includes a recommendation in order to provide the Fellowship with as much information as possible when considering the idea.

***A Guide to World Services in NA*, page 44:**

Approval Process for Recovery Literature

B. Approval-form Literature

1. Approval-form literature is prepared by the World Board and is distributed for a period of time, considering translations, determined by the World Board of not less than one hundred ~~fifty~~ eighty (1~~5~~80) days. The length of this approval period is determined by the World Board based on the needs of the Fellowship and the piece being considered for approval.

Opt-In Funding

The final motion from the board is asking that conference participant funding be opt-in rather than opt-out. Any delegate from a seated region or zone who requests total or partial funding will receive it.

This is really about a change in our collective culture. Currently, World Services automatically funds (including travel, food, and lodging) all delegates from seated regions and zones. Over the years, since we've been reporting about resource challenges at World Services, an increasing number of regions have chosen to opt out of funding from NAWS and assume some or all of the cost to send a delegate themselves.

From 2008 to 2018, the conference seated 22 regions and zones. That should translate to a 20 percent increase in travel funding over that time, which it did not. Gathering hundreds of people together in a conference room for a week is expensive: the cost of the conference room, the sound system, the electronics, the setup and breakdown of the room. There is no way to avoid a large expense in a group our size. In the past ten years, as the conference has grown, expenses such as risers and audiovisual needs have increased, but delegate travel expense to NAWS has not.

Talking about the cost of the WSC and the possibility for regions to fund their delegates has made a difference. The board's recommendation is to build on this change in culture and expectation. If this motion passes, delegates would indicate on the reservation form each participant fills out whether they need funding. If they do, NAWS will cover it.

Motion 12 **To change the current policy of NA World Services automatically funding delegates from seated regions and zones to the WSC to funding available upon request.**

Maker: World Board

Intent: To encourage service bodies to fund their delegates, but ensure that regions and zones that need the funding are able to have it.

Policy Affected: *A Guide to World Services in NA,* page 31:

Operational Guidelines of the WSC

4. The World Service Conference offers fund~~s~~ing, upon request, for the attendance of a delegate from each seated region or zone to the meeting of the WSC~~, which is held every two years~~. This funding includes travel, lodging, and meal expenses only. This policy ~~would~~ cover~~s~~ all ~~previously~~ currently seated regions and zones that have attended one of the past three conferences.
5. Any zonal forum with two or more zonally seated regions or communities that are not seated at the World Service Conference may choose to send one zonal delegate and alternate to the World Service Conference to represent those regions or communities. ~~Zonal delegates are eligible to receive the same funding from NA World Services as regional delegates when attending the WSC. This funding includes travel, lodging, and meal expenses only.~~

Literature, Service Material, and IDT Survey

This is the fourth time we are including a survey in the *Conference Agenda Report* to help set priorities for recovery literature, service material, and Issue Discussion Topics (IDTs). The results of this survey will help delegates select Issue Discussion Topics and prioritize IPs and service material to work on in the cycle ahead. For each conference, we compile results from members and from conference participants—seated regions and zones. Those results are distributed at the conference and included as an appendix in the minutes.

We are asking members to fill in the online survey posted at **www.na.org/surveys** by 1 April 2023, and we will compile those responses for the conference to consider. We are also asking conference participants to collect the conscience of their service bodies by the same date. We will compile those results to distribute as well.

Four of the items in this survey come from motions the WSC has already approved to create project plans, and those are shown in blue with an asterisk after the title. The date in parentheses after these items is the year the motion was passed. Most of the remaining ideas are carryovers from the previous three surveys. We have also included the applicable ideas contained in regional and zonal motions in the 2023 *CAR* as well as ideas we have heard since the last conference through conversations, emails and phone calls, workshops, and input to the planning process.

The survey keeps getting longer and longer, and it can be a bit overwhelming. To keep the size of the lists practical, we have tried to group similar ideas, and we eliminated some items from previous *CAR* surveys that had a very low selection rate. The responses to a more concise list will provide conference participants with a clearer direction to move forward.

After compiling all of those ideas, we distributed a draft of this survey to conference participants for input, and we have incorporated their ideas for changes where possible. Some participants suggested they would like to see an even more abbreviated list of choices, and perhaps in the future we will develop a process by which participants can collaboratively vet the *CAR* survey lists. In the meantime, we appreciate you taking the time to read through the options and help set priorities. .

The pandemic changed all of NA. At World Services, the work we were able to do changed, and so did the priority of what was needed. ***Virtual Meeting Basics*** is an example of a priority established by the WSC in spite of the conference's previous decision to prioritize FD Basics. We expect this survey will help all of us to understand what our members and service bodies would most like to see worked on. In keeping with our theme for the cycle, we are truly all Creating our Future. We hope that members will participate and encourage other members to do the same.

Recovery Literature

Unless otherwise directed by WSC 2023, we are planning to work on finalizing revisions to *The Loner* IP, which was a project passed in 2020. Members were clear in their responses to the *Loner* survey about what they would like to see changed or included. We have also surveyed the Fellowship about their ideas for material to be in an IP about drug replacement therapy/medication-assisted treatment (DRT/MAT) as it relates to NA. WSC 2018 approved a motion to create a project plan to create that IP, and the 2020 WSC approved the idea for a survey and had consensus to accept "DRT/MAT as it relates to NA—what do we want to say in a piece of NA literature?" as the first Issue Discussion Topic for the cycle. We will be reporting the results of both surveys in the *Conference Report*.

Selecting up to three of the options on the next page will help the WSC set possible priorities for future work/project plans. We will collect responses from members until 1 April 2023, and we will compile those responses for the conference to consider. We are asking for regions and zones to submit their regional and zonal consciences by the same date so that we can compile those to distribute as well. (For an example of previous *CAR* survey results, see Appendix I (pp. 114–116) in the **2018 World Service Conference Minutes**. (Regional and zonal *CAR* survey results were incomplete for the 2020 *CAR* because of the pandemic.)

New Recovery Literature (choose up to 3)

No new literature
○ No new recovery lit
New literature to support stepwork
○ Booklet of Step study questions taken from Chapter Four, "How It Works," in the Basic Text
○ Step working booklet focused mainly on Steps 1–3, aimed primarily at new members and those in treatment and drug courts
○ Step working guide aimed at members not new to working the Steps
Create a new IP or booklet
○ DRT/MAT as it relates to NA* (2018)
○ On using social media in NA* (2018)
○ Members' experience, strength, and hope on trustworthiness and trusting the process
○ IP for a daily personal gratitude inventory
○ Personal stories about relationships and families in recovery
○ An IP for newcomers containing the NA suggestions
○ An IP focused on meditation
○ Dealing with trauma/PTSD in recovery
○ Spirituality in service: Atmosphere of recovery and spiritual benefits of service
○ Dealing with grief in recovery
○ Spirituality in NA: What does it mean that NA is a spiritual, not religious program? Including a list of spiritual principles with definitions
Targeted literature
○ Literature for women in recovery* (2020)
○ Literature for atheists and agnostics
○ Literature for younger members
○ Literature for older members
○ Literature for experienced members/"oldtimers"
○ Literature for LGBTQ+ members
○ Literature for First Nations/indigenous members
○ Literature for members who are veterans
Other
○ Other:

Revisions to Existing Recovery Literature (choose up to 2)

No revisions
○ No revisions to recovery literature
Revise an existing piece of NA literature
○ Add "gender" to "What is the NA Program?" to read: "Anyone may join us regardless of age, race, gender, sexual identity, creed, religion or lack of religion."
○ Review currently approved recovery literature to gender neutralize NA literature, where possible
○ Revise and simplify the *Step Working Guides*
○ Revise the *Sponsorship* book
○ Revise *Recovery and Relapse*
○ Revise *Accessibility for Those with Additional Needs*
○ Revise *Am I an Addict?*
○ Revise *H&I Service and the NA Member*
○ Revise *PI and the NA Member*
○ Revise *The Concepts* booklet
Other
○ Other:

Service Material

Selecting up to three of the options below will help the WSC prioritize the focus of a service tools project for the upcoming cycle, and it may help set possible priorities for future work/project plans. *Virtual Meeting Basics* was created during the pandemic as a direct result of our experience and the responses to the *CAR* survey. It is posted at www.na.org/virtual and www.na.org/basics.

Once upon a time, NA service material was dominated by weighty handbooks (www.na.org/handbooks). In more recent years, we have been trying to collect best practices, in shorter, easier-to-translate "basics" (www.na.org/basics). The basics are accessed more frequently online than longer service material is, and they are well suited to our diverse and international membership.

While ideas for new service tools are valuable and we want to hear them, we also have a lot of

very old service material that still contains helpful ideas but needs to be updated to reflect current experience and reality. We have divided the service material section into ideas for new pieces and ideas for revisions, as we did for recovery literature.

New Service Material (choose up to 3)

Public relations
○ PR video explaining what NA is, how it works, and how to contact us* (2020)
○ Our public image: creating confidence in NA
○ More social media guidelines above and beyond the service pamphlet
○ More short, focused PR resources such as tools to assist in reaching the medical community, criminal justice, and those who refer people to NA
○ Sponsorship behind the Walls basics
○ Internal PR basics
○ Cooperation, not affiliation—our relationship to others, including AA
NA services 101
○ Virtual service basics (including virtual service meetings, virtual meetings and areas participating in the service system, virtual workshops and trainings, etc.)
○ The impact of technology on services and workloads
○ Best practices for service workshops
○ Carrying the NA message effectively
○ Personal application of Concepts and Traditions, as a member and trusted servant
○ Facilitation basics
○ What is NA World Services and how does it work?
○ Fellowship development basics
○ Collaborating among service bodies
○ When service bodies split or reunify
○ Description of service commitments at areas and regions
○ Effective report writing
○ Tools for leadership and mentorship, including as they relate to service bodies and new meetings
○ Group support forum, local service conference and local service board basics
○ Policy in NA—different kinds of policy styles and approaches

Legal, financial, and Seventh Tradition tools
○ Self-support in NA (what it means, how we handle funds, banking, digital fund flow, fundraising, misappropriation, etc.)
○ Information for creating legal entities/incorporating
○ How do we protect the NA message and carry the message? (understanding the *FIPT* and the issues around illicit literature, local websites, virtual meetings, etc.)
○ Area treasurers' and budgeting basics

Revisions to Existing Service Material (choose up to 2)

Revise existing service material
○ Update *A Guide to Local Services in NA* (*GLS*)
○ Revise *Translation Basics*
○ Revise and update *Planning Basics*
○ Revise and update *PR Basics*
○ Revise and update *H&I Basics*
○ Revise and update the service pamphlet *Disruptive and Violent Behavior* to reflect current practices in the Fellowship, and include the issue of sexual predators
○ Revise and update the service pamphlet *Group Business Meetings*, with a section on using a CBDM process, and the concept of delegation
Other
○ Other:

Issue Discussion Topics

The Issue Discussion Topics are just that—issues that are discussed throughout the Fellowship in the time between conferences. The results of those discussions can contain some of NA's best practices and have created the foundation for several service pamphlets and other tools and literature, including the Building Strong Home Groups worksheet, service pamphlets such as *Principles and Leadership in NA Service* and *Disruptive and Violent Behavior*, the *Money Matters* IP, and more.

Selecting up to three of the options below will help the WSC select Issue Discussion Topics for the upcoming cycle.

Thank you for your help with this!

Your World Board

Issue Discussion Topics (choose up to 3)

IDTs for the next cycle
○ Gender-neutral and inclusive language in NA literature
○ Reimagining and revitalizing service committees (to further the reach of the NA message, improve communication, provide mentorship and training, and make service more attractive and accessible, learning from our experience the past few years)
○ Dealing with disruptive and predatory behavior
○ Self-support in NA: Seventh Tradition and Eleventh Concept
○ The *Fellowship Intellectual Property Trust* (*FIPT*)
○ Our Symbol—a closer look
○ The importance of our Traditions to NA
○ Group conscience and consensus-based decision making
○ PR basics—what they are and why they are important
○ Spiritual principles and service
○ Social media and PR issues
○ Making NA accessible for those with additional needs
○ Building our unity while respecting our differences
○ Retaining members in NA
○ Illness/medication and our literature
Other
○ Other:

Human Resource Panel Report

Greetings from the Human Resource Panel (HRP). We hope that everyone is safe and healthy in these busy times. For those who may not be aware, the HRP is a panel of four NA members elected at the World Service Conference (WSC). Our charge is to identify other NA members best suited for nomination and potential election at the WSC for the World Board, HRP, and WSC Cofacilitator positions. For more on that process, you may want to visit the following webpage and related links: **www.na.org/?ID=HRP-info**

As a brief history, the HRP was formed in 1998 as a result of the multiyear WSC inventory and transition process. At that time, it was determined that the WSC would benefit from an independent panel to evaluate potential trusted servants. As a part of that, the World Pool, a database that retains information on NA members interested in being of service at the world level, was created. The HRP and the World Pool are two components of a system that was intended to provide a new approach to identifying and selecting trusted servants.

As we moved forward from 1998, conference participants saw a need for service bodies to be able to offer candidates for consideration directly to the HRP, and separate from the HRP's initial screening. In 2006, the WSC adopted a process for just that. The *RBZ process*, as it has come to be called, provides NA regions, the World Board, and zonal forums the ability to recommend members who they think would make viable candidates for nomination at the WSC. RBZ recommendations provide a point of reference, typically based on the service body's direct experience with the candidate, for the HRP to consider when identifying nominees for election at the WSC.

So, the RBZ process became another opportunity for nomination at the WSC. These RBZs, along with members from the World Pool, are evaluated by the HRP each cycle. In addition, in a carryover from the old system before 1998, members of the WSC can offer a nomination from the floor of the WSC, separate from the HRP's evaluation. These are the avenues for nomination at the WSC. And that brings us to where we are today and why we offer this report.

The HRP has studied all of this for the last few conference cycles; here are some of the results. Since the start of the RBZ process in 2006, the WSC has elected 43 World Board members. Forty-one (95.5 percent) have had at least one RBZ recommendation. Most RBZ recommendations are for World Board positions, but RBZs are also submitted for HRP and Cofacilitators. Altogether, 74 WSC trusted servants have been elected since 2006, and 54 (73 percent) have had an RBZ recommendation. The other 20 (27 percent) did not. And since the start of the RBZ process, those 20 represent 0.36 percent, or just over one-third of 1 percent, of the 5,500 members in the World Pool. Finally, since 1998, only one nomination from the floor, back in 2002, has resulted in a WSC election.

This historical data from WSC elections indicates to us that voting participants have the greatest confidence in nominees with an RBZ recommendation. We have stopped asking for candidate references, and instead use the RBZ recommendation, since it is, in fact, a committee reference. Simply put, the RBZ process is the most effective means to identify the most qualified candidates for election at the WSC.

Based on all of this, and for the first time, we have asked all members who wish to be considered for nomination at WSC 2023 to acquire an RBZ recommendation. With this experience and information as a foundation, we believe we will be ready to suggest a few changes to the process for decision at WSC 2023. Once the elections process is completed, we intend to ask the WSC to change policy to require that all candidates go through the RBZ process moving forward. With that, the World Pool would no longer be needed to collect information on members willing to be of service at the world level. We would repurpose the database to collect information on RBZ candidates each conference cycle. A WSC decision to rely on regions, the board, and zones to forward candidates (RBZs) would also retire the process that provides for nominations from the floor of the WSC.

One point of common confusion related to this discussion is the purpose and use of the World Pool. At the onset, the hope was that the World Pool would become a resource for the World Board and the World Service Conference to identify trusted servants not only for nomination, but also for workgroups and focus groups. That has not proved to be the case. For many cycles now, the most productive path has been for the World Board to announce workgroup opportunities in direct communications to conference participants and to all members via *NAWS News* or NAWS Update emails. It has never been the responsibility of the HRP to select workgroup members. The changes we are suggesting will not affect the process of selecting workgroup members.

That was probably a lot to absorb, and the *CAR* is filled with other very important information. We are not asking for any decisions now, and there are no motions to consider here. As has become the process for a change of policy at the WSC, we will complete this cycle using the approach offered above, and if all goes smoothly, we will ask participants to affirm these changes at WSC 2023. Thanks to all.

Regional & Zonal Motions

The Resource Crunch

When someone takes more food from a buffet than they can comfortably eat, we might say "their eyes are bigger than their stomach." Well, that is the situation we find ourselves in at World Services relative to project work.

In the 2020 *CAR*, we wrote this:

> So we seem to be, once again, in a place where we may draft and present more project plans than we can reasonably expect to work on in a given cycle. In the upcoming 2020–2022 cycle, we are planning for only one in-person workgroup because of financial considerations. We have been doing more with less by utilizing virtual workgroups and web meetings, but we are still limited in the number of projects we can coordinate in a given cycle.

Less than four months after that *CAR* was published, the whole world shut down, and as we have mentioned earlier in this report, we are slowly recovering at World Services, but we are not where we were before the pandemic.

The ratio of work-to-resources today is substantially higher than three years ago. We have more on our plate, fewer staff, and less income. Even without any new idea or motions passed, we cannot eat everything on our plate, so to speak. (The introduction to the *CAR* survey (p. 39) contains an update on the work we are already committed to doing, including the projects that have already passed at previous conferences.)

The crucial question for the conference and the Fellowship isn't "Is this a good idea?" The crucial question is "What do we think is most important to do first?" There are more good ideas than time, money, and people to accomplish them. The conference utilizes the *CAR* survey to help set priorities, and so we have listed in the survey all the ideas for new or revised literature contained in the motions that follow.

Project plans are included in the Conference Approval Track material, which is published in January before the WSC. In 2016, we began including general project plans for service material and recovery literature and letting the conference determine the focus, with the results of the *CAR* survey to guide them. We will take that approach again at WSC 2023.

At times we get asked if a zone or a region could do the work on a World Services project to ease some of the resource crunch. It's definitely true that we can do more when we work together. We would love to see more zonal input on projects. We need to develop better processes to allow for that cooperation and teamwork when we are collecting ideas to shape a project, for instance, as we recently did for a revision of *The Loner* IP and for a potential IP on drug replacement therapy and medication-assisted treatment (DRT/MAT) and NA. Delegating a World Services project to a zone doesn't seem like the best solution, though. Zones already have plenty to do in service to their member regions—and regions to their areas. The need for Fellowship development and public relations service work and support is more than a full-time job.

Typically, WSC projects have workgroups or focus groups of volunteers and staff members, led by the board, who collect ideas, input, and writing from members around the world and put together whatever deliverables are called for. The process might involve surveys and input forms in multiple languages responded to by hundreds or thousands of members. There may be web meetings or workshops. Drafts are published and circulated. The board as a whole is kept updated throughout the process and, in turn, communicates to the Fellowship. NA meetings are held in more than 140 countries, and our members speak close to 100 languages (with literature translated into 57). It's not practical to expect a local service body, even one as diverse and far-reaching

as some of NA's zones, to coordinate a world-level project. The World Board is elected by and accountable to the conference and the Fellowship. Ultimately, the projects passed by the World Service Conference need to reflect the worldwide Fellowship of NA, and that is the work of the World Board. Unfortunately, there's only so much work that can be undertaken at once.

The Strategic Planning Process

In a typical conference cycle (this past cycle has *not* been typical), World Services uses a strategic planning process to help set priorities. The board puts together the strategic plan over the course of several meetings, looking at the needs of the Fellowship and the resources available and drafting a list of projects in line with the vision, goals, and objectives. The board does its best to offer a set of project plans in the Conference Approval Track material that will serve NA in the cycle ahead.

The other source of ideas for project plans is regional and zonal motions. The challenge is that regional and zonal motions to create project plans are considered independently of each other and are not part of the strategic planning process. Our goal is to continue evolving the planning process, ideally to create a more collaborative approach so that we can unify these streams of ideas—the ideas that come from motions and the ideas that are in the strategic plan.

In the meantime, the *CAR* survey is the place where conference participants and other members can look at all the ideas for recovery literature and service material side by side. Fellowship responses to the survey help Conference participants make responsible and realistic decisions about how to prioritize the work so that World Services can tackle the highest priorities first.

The Regional/Zonal Motion Process

There are 13 regional and zonal motions in this *Conference Agenda Report*. At one point last summer, we knew of close to 30 possible motions, including some that were in the 2020 *CAR* but were never addressed by the WSC. When we realized we would have to hold the first-ever virtual WSC in 2020, we asked participants to decide what the focus of the meeting would be. Delegates chose what business to address and, as a result, not all of the *CAR* motions were introduced in 2020.

To plan for the 2023 *CAR*, the board reached out to all the makers of the remaining 2020 *CAR* motions in May at the conclusion of WSC 2022 and to the regions and zones that were considering offering new motions as we heard from them. Five makers of 2020 motions opted to resubmit them, and two did not. The motions in this *CAR* that were initially published in the 2020 *CAR* are Motion #2, #3, #13, #14, #16, #17, and #22.

The deadline to submit a draft motion for the *CAR* is 1 August. Seventeen motions were submitted by then, including those from 2020. Over the course of the month, the board worked with the motion makers to help them get the motion "*CAR* ready." (*A Guide to World Services* explains what makes a motion "*CAR* ready" on pages 19–20.) The board will also typically let a region or zone know if another participant has submitted a similar motion. In some cases, participants decide to work together on one motion rather than submit two similar motions.

Sometimes a discussion with the board can bring about a resolution without the need for a motion. This cycle, the board made two commitments to regions in lieu of motions. One commitment was to issue a report within a year of WSC 2023 about the impact and financial considerations of the NA World Service Office location or relocation. After the report is released, the NAWS Executive Director and some members of the board will meet with the region to answer questions and have a discussion, if requested. The second commitment was to create a brand book or visual style guide for the use of NA trademarks within a year of WSC 2023 and include it as a resource in the *PR Handbook*. We will report more on both of these topics in the year after the WSC.

The final draft deadline for *CAR* motions was 30 August, and it was extended slightly for one region whose delegate had COVID-19. Four motions were withdrawn, including the two that were resolved through agreements with the board. The end result is the 13 motions that follow.

RECOVERY LITERATURE PROJECT IDEAS

As we have said repeatedly throughout this *CAR* (and before that!), there are always more ideas for projects than resources to accomplish them. The events of the past few years have exacerbated that challenge. We are taking the same approach at this conference that we did for the last three conferences. We will offer general project plans for recovery literature and service material, and the conference will use the *CAR* survey results to help determine the specific focuses. (Project plans are included in the Conference Approval Track material.)

The ideas for new or revised literature specified in Motions #13–16 are included in the *CAR* survey.

Other resources that may be helpful when considering the motions below:

- The introduction to the survey on page 39 of this *CAR*
- World Services Board of Trustees Bulletin #19: Gender-specific language and use of the word "God" in NA literature: www.na.org/?ID=bulletins-bull19
- Addendum E: List of materials we publish including translations, page 183

Motion 13 To direct the World Board to create a project plan for the next World Service Conference (WSC), for the development of a new IP for daily personal inventory of gratitude.

Maker: Argentina Region

Intent: To create a new resource for the fellowship members, through a new IP for the daily personal inventory of gratitude.

Rationale by Region: A new IP brochure is a tool for the members of the Fellowship that inspires us to make a daily personal gratitude inventory, that promotes actions inspired by the spiritual awakening of the Twelfth Step of NA that encourages us to express our gratitude during the *Just for Today* and/or daily basis.

Members—at any stage of our personal recovery process that we find ourselves—can be inspired by questions about this spiritual principle, with direct actions of gratitude and/or gratitude list among others, and try to express growth in recovery through gratitude.

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

World Board Response: The introduction to the regional and zonal motion section of this *CAR* in the preceding pages explains our dilemma—that there are more good ideas than ability to accomplish them—especially now. This idea is included in the *CAR* survey (p. 39). The *CAR* survey will help conference participants make decisions about what to prioritize. Using the survey to guide decisions about what recovery literature and service materials will be worked on allows the Fellowship and the conference to consider ideas in relation to each other and establish priorities. The survey includes all of the ideas for recovery literature and service tools that have been offered by conference participants.

We are supportive of whatever the Fellowship chooses as a priority. Given the backlog of work, however, we aren't sure we can commit to much more than we already have on our plate.

We appreciate that the Argentina Region was willing to work out a solution to one of their concerns without requiring a *CAR* motion. The idea to create a visual style guide came from Argentina, and it's a tool that will help many service bodies (and World Services!). We have committed to producing something in the year to follow WSC 2023. Thank you, Argentina!

Motion 14 **To direct the World Board to create a project plan for consideration at the next WSC to investigate changes and/or additional wording to NA literature from gender specific language to gender neutral and inclusive language.**

Makers: Sweden and Australia Regions

Co-makers: Northern California Region, Wisconsin Region, Ontario Region

Intent: This motion will give the conference and the Fellowship the ability to meaningfully discuss changes to our literature to be more inclusive of all our members.

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Regions: Our literature currently makes multiple references to gender specific and exclusive language.

We recognise the importance of being able to identify oneself with the language described in our texts in order to embrace the programme. In our Fellowship there are many who identify as LGBT+, who have experienced being made invisible in a great variety of situations. As a worldwide Fellow- ship we acknowledge that many cultures embrace non-binary individuals.

Many of our members have expressed reservation at the male pronoun references to God, which may invoke an image of a specific God or religion. We believe this conflicts with our philosophy which encourages all members to develop a personal relationship with a God of our own understanding.

In NA we are addicts first and foremost and we must always keep our doors open for all addicts who have a desire to recover. We want our literature to be inclusive to all, regardless of how we might identify.

The personal stories section of our Basic Text contains stories from transgender individuals, and we wish to build on this gender-neutral foundation to reflect in all NA text. We allow for personal stories to be exempt from gender-neutral language and remain as they are currently written.

When collaborating with Sweden and Australia it became clear that Sweden wished to have gender-neutral language that was complimentary to the existing language, whereas Australia felt that replacement was the way to proceed. The motion has been written as such that all options can be explored in the project plan and recommendations provided back to the WSC and Fellowship.

World Board Response: The motion seeks to open a discussion that appears to be much needed. The subject of gender specificity/neutrality in NA literature has gained increasing attention and energy in the intervening years since this motion first appeared in the 2020 *CAR*. As the intent explains, "This motion will give the conference and the Fellowship the ability to meaningfully discuss changes to our literature to be more inclusive of all our members." We support the idea of having a discussion and believe it is the Fellowship's collective responsibility to look at how our message is perceived. The motion is not asking for a decision about changes to literature; it's about whether we're willing to have the conversation, to "investigate." This idea is included in the *CAR* survey (p. 39).

We have had related discussions in the past, but not since the early 1990s, and much has changed since then. The discussions in the '90s were primarily focused on whether to use the word *God* in NA literature, while this motion seeks to open a discussion specifically about gender neutrality. The **trustee bulletin on gender-specific language** was written in 1992, when there were fewer than 20,000 NA meetings worldwide and the Basic Text was published in four languages. Now there are more than 76,000 meetings and we publish the Basic Text in 36 languages. Our membership has grown and diversified over the years.

A word about translations: NA's literature is developed in English, and English-language texts act as the prototype for any translation efforts. Different languages handle gender differently, and local translation committees are familiar with what they need to do to be consistent with the English texts. For these reasons, we anticipate the discussion would focus on English-language literature.

Motion 15 **To direct the World Board to create a project plan for the next WSC to initiate the process for the Fellowship to approve adding "gender" to "What is the NA Program?" to read: "Anyone may join us regardless of age, race, gender, sexual identity, creed, religion or lack of religion."**

Maker: Southern California Region

Intent: To change 'What is the NA Program' to be more gender-neutral and inclusive.

Financial Impact: There is minimal cost in creating a project plan or framing a discussion.

Rationale by Region: We believe there is a clear distinction between the two terms. Gender refers to one's concept of self as male, female, a blend of both, neither, or other; sexual identity refers to how one thinks of oneself in terms of to whom one is romantically or sexually attracted. While the investigation of changes to NA Literature toward gender-neutral/inclusive language is a worthy discussion toward greater unity, our region is proposing this first step. This sentence is a powerful statement our literature makes about who is welcome to join Narcotics Anonymous. This reading is a basic reading at meetings and this small change would set the tone for inclusivity without having to negotiate too many cultural differences in language and concepts of personal identity worldwide. Inclusion of the word "gender" in this sentence communicates the value system that men and women equally may join Narcotics Anonymous; this also welcomes addicts who do not conform or who define gender for themselves. Until all genders are treated equally worldwide, Narcotics Anonymous must include gender in this sentence so that any addict seeking recovery, despite differences in our identities that might divide us outside of NA, feel welcome to join Narcotics Anonymous regardless of social, political, socioeconomic, religious, or legal restrictions in the world. We bring this proposal forward in anticipation that a seventh edition of our Basic Text will be more inclusive.

World Board Response: This idea is included in the *CAR* survey (p. 39). On the face of it, this may seem to be a simple change, but it is not. "What is the NA program?" comes from a section of the Little White Book that is reproduced in the Basic Text, IP #1, *An Introductory Guide to NA*, and the meeting reading cards.

We understand the motivation behind the motion and share the desire to communicate as clearly as possible that NA is open and welcoming to all. For many members, the revision suggested feels long overdue, and there is a sense of urgency about the issue. Even so, changing NA recovery literature is always a lengthy process. To make any changes to recovery literature policy requires the release of a review and input draft. In this case, we would need to release the whole Basic Text or Little White Book for input if this project passes.

A change to "What is the NA program?" would, in essence, create a Seventh Edition text and require revision of the Basic Text in 36 languages. IP #1 would need to be revised in 57 languages, the Little White Book in 30 languages, the *Intro Guide* in 23 languages, and the meeting reading cards in 38 language versions. In short, this is not a small change.

We believe it would be unwise to undertake this many revisions and this lengthy a process in order to add one word. The idea in this motion could easily be included in the material provided to the project called for in Motion #14 if that motion is adopted. Given that fact, we believe it would be wise to commit Motion #15 to the board. If Motion #14 does not pass, the board will have a discussion and make a recommendation about how to move forward.

Motion 16 **To direct the World Board to develop a project plan, for consideration at the next World Service Conference, to create a booklet of Step study questions where all answers relate to a line in Chapter Four in the Basic Text.**

Maker: Baja Son Region

Co-makers: South Florida Region, México Occidente Región, Northern California Region, Southern California Region, San Diego Imperial Counties Region & Región de México

Intent: To create a fellowship approved, inexpensive, NA Step study questions booklet that relates directly back to the Basic Text.

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan.

Rationale by Region: Our region has had great success using an elemental, non-personal NA Step study material for many decades about the size of *The Group Booklet*. The step study booklet we have been working with contains questions and answers to study questions taken from chapter Four in the Basic Text. When the answers to study questions are the sentences in NA literature then issues of personality, ego, politics, religion and other affiliations are removed. The answer is always the original line in the Basic Text from which the question was created. We believe we are identifying a need not generally understood in the English-speaking part of our Fellowship. The result of this motion would be a Basic Text Step study booklet. Chapter Four of the Basic Text is included in the *Introductory Guide to NA* and when combined with an NA Step Study Questions booklet, we will have a less expensive and effective way to teach the NA program in NA group settings, one-on-one and into both the incarceration and treatment environment. Understanding the 12-Steps as described in the Basic Text provides a strong foundation for all members. The Basic Text is an uncomplicated, heartfelt piece of NA recovery literature which addicts can identify with and embrace. This Basic Text Step Study question guide could be translated early in a communities development or as translations are available. We want to share with you all this NA recovery tool that has been so successful for Baja Son.

World Board Response: This idea is included in the *CAR* survey (p. 39). Results of the *CAR* survey will help the conference decide on priorities and what work to undertake next. We are enthusiastic about tools that will encourage members to work the Steps, but as we have cautioned throughout this *Conference Agenda Report*, the list of work we are already committed to doing even before any decisions from WSC 2023 is daunting.

We support whatever priorities the conference decides upon for recovery literature, but we are duty bound to clarify that if this motion passes and this idea is prioritized by the conference, the project plan would follow our established Fellowship literature review process.

Fellowship ideas and input frame each literature project from the beginning, before any writing even begins to take place. We typically ask the Fellowship what they would like to see in a particular piece of literature, and we use their input to guide the project plan and then the work on the draft itself if the project plan is approved.

The process for creating NA literature involves collecting input, ideas, and writing from the Fellowship as a whole, compiling that input, reflecting those ideas back in a draft piece of literature, and then again asking the Fellowship for input on the draft. That process could create a very different result from what this motion is seeking. We cannot commit to a project that predetermines the outcome of the work before seeking input from all interested members. The worldwide collective process of creating NA literature is inclusive and dynamic. The rationale of this particular motion is, therefore, not something we could accomplish. It's contrary to the collaborative, worldwide process that creates NA literature to mandate the content, creation process, and format of a text before a project even begins. Much like our individual recovery journeys, it's not entirely possible to predict the end result before we begin.

LITERATURE PRODUCTION AND DISTRIBUTION

Resources related to literature development and translations that may be helpful when considering the following motions:

- Addendum E: List of materials we publish including translations, page 183
- *NAWS Annual Report*: **www.na.org/ar**
- *Fellowship Intellectual Property Trust* explanatory video and **Bulletin #34: *Group Conscience and NA Literature*** and **Bulletin #35: *Narcotics Anonymous Copyrights and Literature***. All are posted on this page: **www.na.org/fipt**
- *Translation Basics*: **www.na.org/admin/include/spaw2/uploads/pdf/TBasics_Feb2017.pdf**
- NAWS Update: See link at bottom of **www.na.org/aboutus**
- Literature Timeline: **www.na.org/admin/include/spaw2/uploads/media/web/2018_Literature-Timeline.pdf**

Motion 17 To place an 8 year moratorium on the creation of new recovery literature after WSC 2023, excluding all translations or literature projects currently in development.

Maker: California Inland Region

Intent: To suspend the creation of new literature for an 8 year period and free up NA resources to better focus on carrying the message rather than continual literature development.

Rationale by Region: A moratorium would give our fellowship an opportunity to work more fully with the literature we currently have published and allow international NA communities time to complete translations. NA has a greater body of literature available than ever before. While this has some advantages, the abundance of literature can also create confusion for newcomers.

Our fellowship needs time to work with and fully appreciate our current literature.

Financial Impact: It is not possible to estimate the financial impact of this motion. There could be a savings resulting from not funding literature projects and workgroups, but there could also be a loss from not producing any new literature for sale.

World Board Response: We do not believe this motion will accomplish its intent. Literature development and translations is not an either/or proposition. The World Board comprises members with six different primary languages, and none of us see a moratorium on literature creation as helpful to translation efforts. We believe that NA members want *both*. Both are crucial ways that we carry the message. As the motions above illustrate, the Fellowship continues to ask for new literature. If we stop developing literature, we lose that avenue to carry the message.

This motion appeared in the 2020 *CAR*, and at that time we attempted to clarify the translation process:

> NA translations work is coordinated among a local translation committee (LTC) made up of committed members who are native speakers, NAWS staff, and contracted professionals. In most cases, we use the professional translator as a proofreader and copyeditor to go over the LTC's work. In some cases, a professional will also do some of the initial translations if the LTC is not able to. But it is critical that local members be involved to ensure that the language rings true to NA experience. LTC service is time-consuming and requires both skill and dedication. It takes a great deal of resources to produce translated literature, but the scarcest resource is actually human, particularly local LTC members.

(Motion #17 continued on next page)

As we said in 2020, the biggest challenge for translations is human resources. We are building back staff capacity, but we are not close to where we were before the pandemic, and members serving on local translation committees do the lion's share of the translations work.

We publish in 57 languages today. The literature list included in Addendum E of this *CAR* is testimony to the hard work of so many members and World Services' dedication to translations. We too look forward to a day when "every addict in the world has a chance to experience our message in his or her own language and culture." This motion, however, would not free up resources for translations or production.

Motion 18 **To direct the World Board to create a project plan for the next WSC to study permitting service committees of Narcotics Anonymous who are, or may be, willing to serve as literature printing/distribution and selling centers inside and outside the United States.**

Maker: Tejas Bluebonnet Region

Intent: The intention is to study the impacts of permitting service committees of Narcotics Anonymous inside and outside the United States to print and distribute NA literature.

Rationale by Region: Literature printed and sold by local service committees could get the literature of the fellowship in the hands of the addicts at a lower total cost to the addict. As the revenue from literature sales reduces revenue flow to World, the donations must increase, or the services offered will have to be reduced. The fellowship has grown. We must allow the infra-structure of the fellowship across each country or zone, and around the world, to grow. The local fellowship(s) needs to increase their share of the burden of fellowship development if we are to continue thriving and growing as a whole. It is to better serve addicts by providing literature that is available to them at lower prices and/or costs. We recommend the project plan include a study group that shall consist of such members within or outside the fellowship as the World Board sees fit. We recommend that service committees shall maintain the quality of product already established by NAWS and that the service committees shall determine the price of the literature that they sell and the amount of revenue that they shall pass along to NAWS. We request that the study shall be completed and the results of the study shall be shared with conference participants no later than at the next WSC. Interim updates from the study group shall be provided to conference participants at each Conference Participant webinar and by email between the World Service Conferences.

Financial Impact: There is minimal cost in creating a project plan. The cost to NAWS would be in the project itself if the WSC were to adopt and prioritize the plan. The World Board response below speaks to some of the possible financial repercussions of the ideas in the region's rationale.

World Board Response: The issues this motion takes on are complicated, and we could take pages thoroughly explaining our objection. We have tried to summarize some of what is at stake concisely below. As with any of the issues in this *CAR*, we welcome any questions: wb@na.org

This motion seeks to study decentralization of literature production, with the rationale arguing for the benefits of local printing and the belief that it would result in cheaper literature. We believe the decentralization sought by this motion would undermine NA unity and dismantle the ability to provide mission-critical services, particularly to some areas of the world where NA is new or still in its early stages. Our literature is priced to help offset the cost of services and support, including providing literature to those who need it and protecting NA's intellectual property.

NA made a decision long ago, and has supported it ever since, to stay unified as a worldwide Fellowship, to have a single point of accountability for the production and protection of NA literature, and not to decentralize as some twelve-step fellowships have done.

(Motion #18 continued on next page)

World Services' Sales Policy Philosophy explains:

> Our Mission is to provide services and support which facilitate the continuation and growth of Narcotics Anonymous worldwide. . . .
>
> Since its inception, this policy has been founded upon two fundamental principles: equitable literature distribution, and overall fellowship continuity and growth through a centralized provision of services. Because of this function as a world level clearinghouse for information and guidance, the WSO provides services in addition to literature distribution. Broadly, these services include:
>
> - Informational support to individuals, groups, areas, and regions, as well as local service committees, and
> - Administrative support to Narcotics Anonymous World Services
>
> Such services cost money. Thus, our literature is priced in such a way that the costs associated with providing them are offset, in part, by literature sales proceeds. It is only through members in more developed communities "giving it away" through literature purchases to members in developing communities that our growth and stability have been made possible. Our older members' willingness to shoulder the burden until our newer members are able to become self-supporting makes it possible for our message to be carried to more addicts each year, regardless of their ability to pay today. In this way, "we keep what we have by giving it away" through our sales policy as well as in our program.

NA World Services holds NA's literature in trust for the Fellowship to ensure the integrity of our common message on behalf of our members, now and in the future. We have a duty to ensure that Narcotics Anonymous literature contains text agreed upon by the Fellowship of Narcotics Anonymous. Without this single point of accountability, there is no real way to control what gets printed in NA's name and sold to NA meetings and members and to guard against the threat to the consistency of our message.

It's no secret that some NA members are attached to previously approved editions of the Basic Text and believe the "Baby Blue," a never-approved combination of previous editions, should be what is printed and distributed. What is to stop those members from making such a choice if they are in a position of authority to do local printing? That's just one example of the sort of editorial decision that could get made without centralized literature production.

Excerpts from the Second Edition Basic Text that are preserved in the Baby Blue but not in current literature:

Tradition 4: One might ask, "Are we truly autonomous? What about our service committees, our offices, activities, hot lines, and all the other things that go on in N.A.?" The answer is that **these things are not N.A.***

Tradition 9: The Ninth Tradition goes on to define the nature of the things that we can do to help N.A. It says that we may create service boards or committees to serve the needs of the Fellowship. None of them has the power to rule, censor, decide, or dictate. They exist solely to serve the Fellowship, but **they are not a part of Narcotics Anonymous**.* This is the nature of our service structure as it has evolved and been defined in the N.A. service manual.

**emphasis added, not bold in original text*

The motion speaks to decentralization and the rationale speaks to cheaper literature. These are two very different goals for a project. We do enter into local printing agreements in some places where we are not able to ship literature. But again, registering trademarks and copyrights, overseeing translations, keeping up with the revisions and changes approved by the Fellowship, and protecting NA's name in legal challenges—all of these things are costly services performed on behalf of the Fellowship and in harmony with group conscience. Our office in Europe is an example of regionalized or zonal literature distribution. WSO Europe sells literature that has already been translated, formatted, and

printed to European members and service bodies. The profits from literature sales at that office would not cover the costs of translations, production, trademarks, or copyrights in that zone.

The regional rationale advocates for diverting resources from NAWS, even if that means reducing the services offered by World Services. It also mentions reducing the price of literature, while maintaining the quality of literature and increasing Fellowship development efforts. We often receive a price break because of the size of print runs, and we have decades of experience in quality control, layout, and distribution. Our experience allows us to produce literature cost-effectively and efficiently. Coordinating layout, sourcing materials, overseeing printing, and keeping up with revisions of literature would be a logistical nightmare for most local service bodies. We do not believe all the goals in the rationale can be met without some parts of the world paying a price.

It's true that some service bodies might be able to print some of our literature more cheaply, but those cost savings would come at the expense of the whole. We translate literature into 57 languages, an accomplishment that is only possible with the help of volunteers, and produce more than 1,300 translated titles. Some of the literature we publish never makes money; we spend money in the translation and production process and give away most copies to communities in need, spending much money in shipping to make that happen. The regional rationale says we "must allow the infra-structure of the fellowship across each country or zone, and around the world, to grow," but the end result of decentralization would be to draw resources away from some places and concentrate them in others. This motion would withdraw help from communities that need it most.

If NA wants to redesign the system of literature production and distribution, this is not the way to go about it. In NA we help each other.

PUBLIC RELATIONS/HOSPITALS & INSTITUTIONS

The three motions in this section cover very different aspects of PR and H&I service: external research (Motion #19), NAWS web meetings (Motion #20), and the *H&I Handbook* (Motion #21).

Resources that may be helpful when considering the following motions include:

- NA's handbooks page (the *H&I Handbook* and *PR Handbook* are both posted here): **www.na.org/handbooks**
- Service Basics (including *H&I Basics*): **www.na.org/basics**
- NA web meetings and webinars: **www.na.org/webinars**
- Previous webinar recordings: **www.na.org/webarchive**

Motion 19 To direct the WB to create a virtual Institutional Review Board (IRB) to review all researchers and their research questions that request access to the Narcotics Anonymous population through NAWS to conduct research.

Maker: Wisconsin Region

Intent: To avoid the misuse of Narcotics Anonymous member information.

Rationale by Region: To ensure that the members of the Narcotics Anonymous Fellowship are protected when NAWS is asking them to participate in surveys that are being led by non-NAWS researchers. According to the protected population clause of the American Psychological Association (APA), anyone who has a mental health diagnosis is taken into the protected population when conducting research, further our members, who are addicts are classified in the category of substance use disorder according to the Diagnostic and Statistical Manual 5th Release (DSM-5), which classifies addiction as a mental illness. An

IRB would ensure that consent is given from each member, which would further ensure that our members understood what their answers were going to be used for, as well as ensuring that anonymity and clarity was offered to all who participated in the surveys. An IRB would ensure that ethical and safe practices are carried out for our members and the principles that our Fellowship stand by within our traditions are followed when allowing anyone to conduct research using the Narcotics Anonymous population. This IRB would review all research requests to ensure proper care with our member information.

Financial Impact: A virtual workgroup would have minimal direct costs.

World Board Response: World Services has successfully cooperated with outside researchers on a number of occasions, and the resulting research and articles have brought us closer to our vision that "Narcotics Anonymous has universal recognition and respect as a viable program of recovery." We do not believe it is necessary to create an Institutional Review Board (IRB) because there are already safeguards in place to protect Narcotics Anonymous member information and avoid the "misuse" referenced in the motion's intent.

The only research that NA World Services has agreed to assist with is on behalf of reputable medical researchers who have national and international reach in what they publish. As they are medical researchers, their projects and questions already go through a vetting process. The surveys we have posted to assist in their data collection are voluntary and anonymous. Their research has to be preapproved by a medical review board. Concerns about ethical and safe practices and clarity and consent are all part of the process they are already required to go through. Establishing an IRB at NA World Services would likely mean we would be unable to consider any of these requests because a medical review board is the final sign-off on a research survey. It would be a shame to go back to the days when NA is not cited in any research, and the published research on addiction is mostly funded by pharmaceutical companies.

We have not participated in many research projects. The World Board, who approves these activities, has been and will continue to be very cautious about what research NA World Services cooperates with by facilitating access to NA members.

IRBs are typically associated with the US Food and Drug Administration or research conducted through universities. NA World Services has never agreed to participate in university research projects because of their limited nature and scope. When we receive these types of requests, we forward them to the local delegate or service body to see whether they are willing to work with the request.

Many professionals who might not pay attention to NA if they heard about us elsewhere will listen to what reputable researchers have to say. Cooperating with researchers who are "friends of NA" helps NA's public image, which means providers are more likely to refer addicts to NA and policymakers are more likely to consider NA a viable path to a new way of life. We are more able to help addicts when the public can see what we have to offer.

Motion 20 To direct NAWS to provide at na.org audio recordings of the worldwide webinars on the topics of Public Relations, Hospital &Institution, Step Writing for Inmates, Fellowship Development, Phone Line, and others.

Maker: Wisconsin Region

Intent: To provide access to any interested member of Narcotics Anonymous throughout the world so they can hear the Experience, Strength, and Hope (ESH) of members from other geographic parts of the world.

Rationale by Region: To gain a worldwide understanding of our Fellowship and the services being provided, when holding webinars on the topics of PR, H&I, Step Writing for Inmates, FD, and Phone Lines. This will also help to give information to those who are on different time zones so that they can gain the ESH of those webinars and have access to this helpful information.

(Motion #20 continued on next page)

Financial Impact: There would be an opportunity cost to implement this motion. It would take staff time to clean and post the recordings and to track down all of the necessary release forms.

World Board Response: We want to align our limited human resources where they can be the most beneficial, and we are skeptical that posting these recordings fits that bill. NAWS holds many different types of webinars and web meetings. This motion is asking that recordings of web meetings attended by the chairs of area, regional, or zonal PR or H&I committees be posted online. These meetings consist almost entirely of discussion among these PR or H&I trusted servants. (Phoneline, Inmate Step Writing, and Rural webinars have not been held this cycle because of low attendance.)

Posting the recordings to na.org would require slight cleaning of the recordings; obtaining written releases from all participants, which can be a bit of a challenge; and time to post them on our website. We believe there are more effective ways to provide interested members access to the information. We now create written summaries of each of the PR and H&I web meetings, and those summaries are available upon request.

We also hold quarterly web meetings, open to all members, on topics of Fellowship interest. We post audio recordings of these open web meetings, but NA members do not seem to be very interested in accessing the postings. We do not currently have the ability to track the number of downloads, but none of the recordings is in the top 200 accessed files on na.org. Our first PR and H&I webinars open to all members are scheduled for November 2022.

We will continue to evaluate the effectiveness of our communications and how to best respond to members' needs.

Motion 21 To direct NA World Services to remove the Hospitals and Institutions Handbook from the inventory.

Maker: Free State Region

Intent: To remove an outdated service manual from WSO inventory

Rationale by Region: The *H&I Handbook* has not been updated since the 1980's and with our current literature update process, will never be prioritized high enough. We believe a better approach would be to update the *Public Relations Handbook* Chapter 6 (Criminal Justice) resource section and *H&I Basics* with more information relevant to current practices and methods for carrying our message that could include using virtual platforms and tools. We believe this will better serve our trusted servants involved in H&I service by providing more current and better tools

Financial Impact: There would be minimal financial impact from this motion. The sales of this item are low.

World Board Response: We recognize that the *H&I Handbook* is very out of date, but that it is still used by some members. The *H&I Handbook* was written in 1986 and revised in 1997. *H&I Basics* was created in 2010. We agree that it needs to be updated.

We understand this motion's concern that new communities not translate an obsolete handbook. At the same time, some members are reluctant to remove access to NA service material even if it is outdated. We recently reorganized our handbooks and basics web pages (www.na.org/handbooks and www.na.org/basics). Because of similar concerns, we added this note partway down the handbooks page: "The handbooks below are some of our older service resources, many of which have not been revised for some time. Printed copies of these will be discontinued when current stocks expire." The handbooks below the note are at least 24 years old: phonelines, newsletters, outreach, and literature committee handbooks.

WSC POLICIES

The final four motions are about conference policies. Motion #22 was in the 2020 *CAR,* and our response is much the same. Motions #23 and #24 involve streaming the WSC and conference participant web meetings. Motion #25 is about voting processes.

A resource that may be helpful in considering these motions is *A Guide to World Services in NA*:

- www.na.org/admin/include/spaw2/uploads/pdf/handbooks/2020-2023%20draft%20GWSNA%20to%20post%20updated%20service%20diagram.pdf

Motion 22 **If any Motion or Proposal, in Content or Intent, has been submitted and failed to achieve consensus or adoption at two consecutive World Service Conferences, the previously proposed Content and Intent may not be suggested to the Fellowship in the *Conference Agenda Report* (*CAR*)/ Conference Approval Track (CAT) or at the WSC for one entire conference cycle.**

Maker: Southern California Region

Intent: To use the Fellowship's decision-making processes and time responsibly and effectively.

Rationale by Region: By temporarily setting aside ideas and motions that have not been developed fully, this motion gives the WSC the opportunity to focus its limited time and resources on issues that have garnered a wide attention and direction for the body to decide. It also allows the makers of these motions time to develop the idea and build greater understanding and consensus within the Fellowship. This motion allow us to improve in how we carry out our services and try to learn from challenges and processes that do not yield a consistent or beneficial result.

Financial Impact: None.

World Board Response: We understand and appreciate the underlying intention of this motion. This motion seems to be about better aligning our processes with consensus-based decision making: If the same idea has been discussed repeatedly and is not supported, to allow the conference to take some time before picking the idea up again.

We agree with that idea, but we believe the motion as it is written would be difficult to implement and could have unintended consequences. The motion says that an item with the same "content or intent" could not be introduced for a cycle if it is not adopted for two WSCs in a row.

There are several potential challenges that we can see. Motions can easily have the same or similar intent while addressing very different issues. This motion itself, for instance, has the intent "To use the Fellowship's decision-making processes and time responsibly and effectively." It's easy to imagine that same intent in a motion to cap the number of motions in old business or limit the amount of time the body can discuss a single item before making a decision. Those would be very different motions with the same intent.

We are also not sure how the WSC would account for motions with minor differences. In addition, the motion doesn't leave room for new information that might arise, which would motivate the WSC to want to consider the same issue again.

We appreciate the spirit of the motion. Vetting motions is a topic that has already come up as material for a Future of the WSC workgroup, and we believe a project workgroup could productively discuss the idea and recommend processes for consideration.

Motion 23 **All in person and virtual World Service Conferences will be streamed to provide access to NA members in English audio.**

Maker: Kentuckiana Bluegrass Appalachian Region

Co-makers: Upper Rocky Mountain Region, Russian-Speaking Zone, Western Russia Region, North-West Russia Region

Intent: To allow the entire NA membership a better understanding of what takes place at the World Service Conference.

Rationale by Region: "Our service structure depends on the integrity and effectiveness of our communications." Concept 7.

This would provide an opportunity for the fellowship to gain a greater understanding of what takes place during the World Service Conference. Members in unseated regions can make better informed decisions regarding their local service bodies in relation to the whole NA fellowship. Service bodies that are requesting seating at the World Service Conference or members that are considering serving in a World Service Conference trusted servant position could better understand the responsibilities that they are volunteering for.

In *A Guide to World Services*, a statement could be added to the section currently titled "The Biennial Meeting of the World Service Conference" that states that at least the audio content of the World Service Conference is live streamed, being mindful to adhere to the principles protecting each member's right to maintaining personal anonymity.

Financial Impact: The financial impact of this motion would depend on the technology we utilize.

World Board Response: WSC participants make decisions that change the way business is done almost every conference. Some of those changes are procedural, and some are mechanical. In recent years, participants have made many decisions related to technology: using electronic "clickers" to vote, holding the first (and second) virtual WSC, making decisions by e-poll outside of session hours, e-polling initial straw polls in advance of the WSC, and more. The point is that operations of the WSC have changed at almost every conference with the consent of the participants. Sometimes participants decide to try something for one WSC and see if it seems to work well, in which case they can make a decision to implement it on an ongoing basis, and change WSC policy accordingly.

Allowing participants to make decisions about the processes that affect the WSC meeting is significantly more nimble than making these types of changes through the *CAR*. Given the speed with which technology changes—and the challenges predicting the needs of the WSC in the wake of the pandemic—maintaining a nimble, responsive approach seems more realistic and prudent than mandating policy changes through *CAR* motions.

The conference has already begun discussing options about streaming the WSC. We initially had this discussion in 2020, and the people who are most impacted—the participants whose anonymity was at stake—were not in consensus. It's one of the topics that the board asked participants about in May at the interim conference meeting to get a sense of what participants were comfortable with, given anonymity concerns. This is an ongoing discussion.

The last two WSCs have been streamed from Zoom to YouTube. The main language of the Zoom connection, which is English, is currently the only Zoom feed that can be streamed. Our plans are to also stream WSC 2023, at a minimum in audio, if conference participants concur. We believe that is what the motion is asking for, and we maintain that these types of operational decisions should be left to the WSC to decide and not mandated through a *CAR* motion.

It is worth noting that there are typically a very small number of connections when we stream these types of events. There is simply not broad appeal among members, and that appeal is further eroded

by the limits of the technology: Breakout discussions and translations cannot easily be streamed. Even NAWS open webinars on topics of broad Fellowship interest have scant YouTube streamers. So few people access the audio recordings that we post written reports to www.na.org/webarchive as well.

Again, these types of decisions should be left to conference participants to decide.

Motion 24 **All Conference Participant webinars will be streamed to provide access to NA members in English audio.**

Maker: Kentuckiana Bluegrass Appalachian Region

Co-makers: Upper Rocky Mountain Region, Russian-Speaking Zone, Western Russia Region, North-West Russia Region

Intent: To allow the entire NA membership a better understanding of what takes place during CP Webinars.

Rationale by Region: "Our service structure depends on the integrity and effectiveness of our communications." Concept 7.

This would provide an opportunity for the fellowship to gain a greater understanding of what takes place during the Conference Participants Webinars. Members in unseated regions can make better informed decisions regarding their local service bodies in relation to the whole NA fellowship. Service bodies that are requesting seating at the WSC or members that are considering serving in a CP trusted servant position could better understand the responsibilities that they are volunteering for.

In *A Guide to World Services*, a statement could be added to the bottom of the list that states that at least the audio of the CP webinars is live streamed, being mindful to adhere to the principles protecting each member's right to maintain personal anonymity. CP Webinars otherwise have no policy directly set in *GTWS* at this time.

Financial Impact: The cost would depend on the method used to stream, but would likely not cost anything above the expense already involved with making the WSC accessible to all participants.

World Board Response: Allowing participants to make decisions about the processes that affect their meetings, including conference participant web meetings, is significantly more nimble than making these types of changes through the *CAR*. Given the speed with which technology changes, maintaining a nimble responsive approach seems more realistic and prudent than mandating policy changes through *CAR* motions. Sometimes participants decide to do something on a trial basis, and if it works well, they can decide to implement it on an ongoing basis and change policy accordingly.

The conference has already begun discussing options about streaming the WSC meeting itself. We initially had this discussion in 2020, and the people who are most impacted—the participants whose anonymity was at stake—were not in consensus. It's one of the topics that the board asked participants about in May at the interim conference meeting to get a sense of what participants were comfortable with, given anonymity concerns. Whether to stream the WSC is an ongoing discussion.

Participants have not had the same discussion about streaming the CP web meetings, though when participants were polled about opening the CP discussion board for public viewing at WSC 2018, they did not support the idea. Conference participant web meetings happen throughout the cycle. Not all participants attend, and they focus on reporting, discussion, and questions and answers. They utilize interpretation feeds in multiple languages, none of which could be streamed, and they often feature small-group discussion, which also would not be able to be streamed.

There are typically a very small number of connections when we stream these types of events. There is simply not broad appeal among members, and that appeal is further eroded by the limits of the technology: Breakout discussions and translations cannot easily be streamed. Even NAWS open webinars

on topics of broad Fellowship interest have scant YouTube streamers. So few people access the audio recordings that we post written reports to www.na.org/webarchive as well.

We post reports summarizing conference participant web meetings to the CP Dropbox. Participants are welcome to share these reports if there is interest, but again, interest seems to be minimal. We would like to be able to align our limited human resources where they can be the most beneficial.

Again, these types of operational decisions should be left to conference participants to decide and not mandated through a *CAR* motion.

Motion 25 **All votes and straw polls on motions that were included in the *Conference Agenda Report* or the Conference Approval Track, not to include election ballots, will be displayed in real time for all Conference Participants to see, showing who voted and how they voted.**

Maker: Kentuckiana Bluegrass Appalachian Region

Co-makers: Russian-Speaking Zone, Western Russia Region, North-West Russia Region

Intent: To see how each Conference Participant votes on each motion.

Rationale by Region: This information would be helpful to understand where other Conference Participants stand with their decisions, if a Conference Participant is still unsure of what their vote will be. "Our service structure depends on the integrity and effectiveness of our communications." Concept 7.

We believe each individual Conference Participant's decision on each topic is valuable information in forming Consensus.

Our Fellowship goes to great lengths to encourage and ensure a diverse WSC population. When we utilize secret ballots, we lose helpful information that may not get communicated from Conference Participants that have difficulty expressing themselves in the English language. Some Conference Participants are not called on or lack the verbal communication skills to participate during open discussion and debate. With a public ballot voting system, we would be shown the information of how they voted, even if we weren't given an opportunity to hear why they voted that way.

We appreciate the amount of information shared in a roll call vote process, and the efficiency of the standard voting process. By changing the settings in the handheld clickers, we can have the best of both processes.

Conference Participants who do not possess specific decisions by the time they reach the WSC can benefit from seeing the diversity of their peer communities' choices.

Policy Affected:

A Guide to World Services in NA

WSC Decision Making Processes Addendum, currently page 67–68

> After discussion on a motion has ended, the conference decides the issue by a vote. The following rules apply to voting at the World Service Conference:
>
> 1. Voting occurs in one of the following two ways:
>
> a. Standard vote (using electronic voting pads) - The facilitator first asks if there are any objections to the motion. If none are voiced, the facilitator declares that the motion passes by unanimous consent. If there is any objection, the facilitator asks those in favor of the motion to respond by pressing "1/a" on their voting pad, then asks those opposed

to the motion to respond by pressing "2/b," then asks those abstaining to respond by pressing "3/c," and then asks those present and not voting to respond by pressing "4/d."

b. Roll call vote - Any member can request a roll call vote. Upon recognizing the request, the facilitator will ask the body. If the decision is in support of a roll call vote, the facilitator calls the name of each participant registered at the most recent roll call. When called, the participant responds by stating either "yes," "no," "abstain," or "present and not voting."

After all responses are tabulated, the facilitator announces the number of votes in favor, the number of votes opposed, the number of abstentions, and the number of those present and not voting, and then if the motion was approved or rejected.

Financial Impact: This would require new voting technology, and the cost is uncertain.

World Board Response: Typically, WSC participants decide the operational details of decision making at the conference, rather than mandating rules through *CAR* motions. We believe that is the most appropriate and practical approach.

We have been investigating new voting technology. The company that makes the technology we used at the 2016 and 2018 WSC no longer exists, and we are looking for an approach to polling and voting that will better suit a hybrid conference, rather than the "clickers" we used previously. We are aware that many participants will be unable to obtain visas for WSC 2023, and some may opt not to attend in person because of health considerations.

Thus far, the options we have looked at all feature confidential voting as the default or the only option. The e-polling software that the WSC currently uses lets us know who voted and verifies that there is only one vote from each participant, but how each participant votes is anonymous by design. There is no way to reveal how each participant votes. This appears to be the most common industry standard.

The WSC has been evolving to a consensus-based decision-making process, and in that spirit has made a number of changes to processes, all of which seem to clash with the intention of this motion. The WSC has decided, when meeting in person, that when a vote or poll is taken, the screen will display who has and hasn't voted, but not how anyone voted. That said, there are no "secret ballots" at the conference, with the exception of elections. Voice vote was the primary means for deciding things at the WSC for decades, and now voting is done electronically. Participants have the right to choose a roll call vote for any decision, but the body has decided to move away from roll call and standing votes. This evolution over the past ten years has helped to eliminate peer pressure and strengthen the consensus-building process. The only time that how individual participants vote becomes an issue for the body is when there is consensus on an item and participants who are not part of the consensus are asked if they want to speak.

Trying to match the technology to the demands of a *CAR* motion will limit our options and will restrict the WSC's ability to make decisions and do its work. To give two examples, initial straw polls on all *CAR* motions and amendments are now taken in advance of the meeting, with results posted on na.org. This makes business much more efficient and helps the Cofacilitators plan the order of business at the meeting. It also gives participants a sense of where the body as a whole stands on each motion. The WSC has also elected, at the past two conferences, to make some decisions outside of sessions by e-poll. Both of these things—initial straw polls in advance of the meeting and e-polling after sessions, would be impossible if this motion were to pass. Given the fact that the upcoming conference will be unlike any we have ever had—more hybrid than any in history—it seems wise to allow participants the flexibility to make operational and procedural decisions as necessary and not tie their hands through a *CAR* motion.

Motions & Survey Tally Sheet

We created this tally sheet for you to collect responses on the *Conference Agenda Report* motions and survey. The *CAR* is available for download from the conference webpage: www.na.org/conference. In addition to the motions and survey, the *CAR* contains essays with important relevant content. Summary videos of the *CAR* will be available at www.na.org/conference soon after the release of the *CAR*.

MOTIONS				
#1	**To approve adding zonal delegates from seated zones to the Settlor and Trustor of the *Fellowship Intellectual Property Trust* (*FIPT*).** Maker: World Board Intent: To reflect the decision at WSC 2018 to make delegates from seated zones voting WSC participants and honor the six-month Fellowship review of this proposal that occurred from December 2020 through May 2021. **ARTICLE II: PARTIES TO THE TRUST** The Fellowship of Narcotics Anonymous, as given voice by its groups through their ~~regional~~ delegates at the World Service Conference (WSC), is the Settlor and the Trustor. The delegates are the representatives elected by the regions and zones seated at the World Service Conference. Narcotics Anonymous World Services, Inc. is the Trustee of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. **ARTICLE III: IDENTITY OF TRUST PROPERTY** The Trust Property includes all recovery literature, trademarks, service marks, copyrights, and all other intellectual property of the Fellowship. From time to time, the Trustor may add to, modify, or delete property from the Trust. All additions made to the Fellowship's recovery literature, trademarks, service marks, copyrights and all other intellectual property by Narcotics Anonymous World Services, Inc. shall additionally be considered property subject to this Trust. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust. *Recovery literature* should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is designated as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.	**Yes**	**No**	**Abs**
#2	**To approve the revisions to the *FIPT* Operational Rules contained in Addendum B.** Maker: World Board Intent: To revise the Operational Rules to reflect discussions at WSC 2018 about the Inspection of Trustee Activities and to reflect current practices, terms, and language. A summary of the proposed changes shown in Addendum B includes: • A change to the Inspection Clause to reflect discussions at WSC 2018 and clarify that only the WSC can act for the beneficiary—the NA Fellowship as a whole. • Various "housekeeping" edits: ◦ Changes throughout to update the references to WSC Boards and Committees to better reflect our current structure. The *FIPT* was written before the World Board was created. The suggested language in the proposed revisions describes our current system, not that of 1993. ◦ More consistent terminology to refer to the *World Service Conference* (*WSC*), *Narcotics Anonymous World Services, Inc.* (*NA World Services*). ◦ Two edits to Article 4, Section 12: Trustee Reporting Obligation on page 15 to change *calendar year* to *each fiscal year* and to add independent to the description of the annual audit. ◦ Changing *representatives*, *conference participants*, and *RDs* to *delegates* throughout. While all of these terms are widely understood in NA, this is a legal document and consistency in terminology is important, and *conference participants* has no clear legal definition. ◦ Correcting errors by adding the word *the* on page 24 and other edits on pages 15 and 31. ◦ A change to the way the Inspection Clause is described on page 37 of the Reader's Notes so that the description reflects the changes suggested to the Inspection Clause itself.	**Yes**	**No**	**Abs**

#3	**To approve the revisions to NA *Intellectual Property Bulletin #1* contained in Addendum D.** Maker: World Board Intent: To revise this bulletin so that it provides more direct and clear guidance, and so that it reflects current practices, terms, and language. This bulletin has been largely rewritten. A clean copy of the bulletin with proposed revisions is contained in Addendum C. A copy tracking the proposed changes is included in Addendum D. A summary of the proposed changes to *Intellectual Property Bulletin #1* includes: • Permission would be required to reprint book-length pieces. • Current policy that was not clearly expressed in the bulletin has been added to the text. Groups are only allowed to reproduce currently approved versions of recovery literature, as that is all that NAWS is authorized to publish and distribute, and this permission does not include electronic or online formats. • The introduction has been rewritten and the section on copyright has been moved ahead of the section on trademarks. • Some copyediting changes are suggested, such as using the term *policy* throughout the document, rather than a mix of *policy* and *guidelines*.	**Yes**	**No**	**Abs**
#4	**To acknowledge that an NA meeting that meets regularly in person or virtually can choose to be an NA group if they meet the criteria described in *The Group Booklet*, including the six points for an NA group, and are consistent with NA philosophy as expressed in our Traditions. *(Footnotes will be added to* The Group Booklet *and* GLS*, reflecting the decision of the WSC, if this motion passes, and referencing* Virtual Meeting Basics *as a possible resource.)*** Maker: World Board Intent: To recognize NA groups that meet virtually, including online and by phone.	**Yes**	**No**	**Abs**
#5	**To revise A Vision for NA Service, changing the phrase "his or her own language and culture" to the phrase "their own language and culture." *(If this motion passes, A Vision for NA Service will be revised in future printings, including in Fellowship-approved recovery literature.)*** Maker: World Board Intent: To revise the Vision Statement to be more inclusive.	**Yes**	**No**	**Abs**
#6	**To approve a change to World Services Translation Policy in *GWSNA* to allow the possibility for up to six locally developed personal stories to be included in translated Sixth Edition Basic Texts, if the stories have first been published in the Little White Book of that language. These stories would be placed in their own section in Our Members Share with the following language preceding them:** *A Vision for NA Service looks forward to a day when addicts around the world have the opportunity to experience our message in their own language and culture. In pursuit of that vision, communities or language groups that have published local stories in the Little White Book may include up to six of those stories in the Basic Text if they choose. These* [fill in the number] *stories were originally published in the* [fill in the language] *Little White Book in* [fill in the year]. Maker: World Board Intent: To better reflect our Vision that "every addict in the world has the chance to experience our message in [their] own language and culture . . ." in our primary text.	**Yes**	**No**	**Abs**
#7	**To extend the six World Board members' terms currently expiring in 2024 through the end of the upcoming World Service Conference cycle.** Maker: World Board Intent: To accommodate the change to the WSC cycle that has already occurred and avoid World Board terms ending in the middle of a conference cycle.	**Yes**	**No**	**Abs**

#8	**As a result of the COVID pandemic, to suspend the World Convention of NA (WCNA) rotation policy after 2024, to allow the World Board to determine what is possible and practical moving forward and then seek approval from conference participants.** Maker: World Board Intent: Given the disruption in the rotation of WSC and WCNA that has already occurred, the increases in event costs, and the other changes brought about by the pandemic, to allow an evaluation by the World Board and approval by conference participants for what is possible and practical in the future.	**Yes**	**No**	**Abs**
#9	**To approve a three-year World Service Conference cycle on a trial basis following WSC 2023 through WSC 2029. Following 2029, the WSC cycle would return to two years, unless another decision is made.** Maker: World Board Intent: To put into practice some of what we've learned during the pandemic so that we can shift more resources to work that more directly carries the message. This would bring the WSC resource allocation in line with other changes that have been made in World Services—cuts in staff levels and a 50% reduction in in-person board meetings.	**Yes**	**No**	**Abs**
#10	**If Motion 9 is adopted, to approve an interim virtual WSC in the middle of the conference cycle for decisions that are legally necessary and those that conference participants choose to address. As was done in the 2020–2023 cycle, material would be posted on na.org under the same deadline policies as the CAT (90 days prior) and all voting conference participants would be polled to choose the items they wish to address.** Maker: World Board Intent: To allow conference participants to address some WSC business between in-person conference meetings.	**Yes**	**No**	**Abs**
#11	**If Motion 9 is adopted, to approve a change to the release of the *Conference Agenda Report* (*CAR*) to be thirty days earlier than the current policy of 150 days prior to the start of the World Service Conference. The new *CAR* release day would be 180 days prior to the in-person WSC meeting for English, 150 days for translated versions. The deadline for the finalization of regional and zonal motions would be 270 days. The *Conference Agenda Report* will be posted on na.org at no cost to members.** Maker: World Board Intent: To release the *CAR* earlier to allow more time for its review.	**Yes**	**No**	**Abs**
#12	**To change the current policy of NA World Services automatically funding delegates from seated regions and zones to the WSC to funding available upon request.** Maker: World Board Intent: To encourage service bodies to fund their delegates, but ensure that regions and zones that need the funding are able to have it.	**Yes**	**No**	**Abs**
#13	**To direct the World Board to create a project plan for the next World Service Conference (WSC), for the development of a new IP for daily personal inventory of gratitude.** Maker: Argentina Region Intent: To create a new resource for the fellowship members, through a new IP for the daily personal inventory of gratitude.	**Yes**	**No**	**Abs**

#14	**To direct the World Board to create a project plan for consideration at the next WSC to investigate changes and/or additional wording to NA literature from gender specific language to gender neutral and inclusive language.** Makers: Sweden and Australia Regions Co-makers: Northern California Region, Wisconsin Region, Ontario Region Intent: This motion will give the conference and the Fellowship the ability to meaningfully discuss changes to our literature to be more inclusive of all our members.	**Yes**	**No**	**Abs**
#15	**To direct the World Board to create a project plan for the next WSC to initiate the process for the Fellowship to approve adding "gender" to "What is the NA Program?" to read: "Anyone may join us regardless of age, race, gender, sexual identity, creed, religion or lack of religion."** Maker: Southern California Region Intent: To change 'What is the NA Program' to be more gender-neutral and inclusive.	**Yes**	**No**	**Abs**
#16	**To direct the World Board to develop a project plan, for consideration at the next World Service Conference, to create a booklet of Step study questions where all answers relate to a line in Chapter Four in the Basic Text.** Maker: Baja Son Region Co-makers: South Florida Region, México Occidente Región, Northern California Region, Southern California Region, San Diego Imperial Counties Region & Región de México Intent: To create a fellowship approved, inexpensive, NA Step study questions booklet that relates directly back to the Basic Text	**Yes**	**No**	**Abs**
#17	**To place an 8 year moratorium on the creation of new recovery literature after WSC 2023, excluding all translations or literature projects currently in development.** Maker: California Inland Region Intent: To suspend the creation of new literature for an 8 year period and free up NA resources to better focus on carrying the message rather than continual literature development.	**Yes**	**No**	**Abs**
#18	**To direct the World Board to create a project plan for the next WSC to study permitting service committees of Narcotics Anonymous who are, or may be, willing to serve as literature printing/distribution and selling centers inside and outside the United States.** Maker: Tejas Bluebonnet Region Intent: The intention is to study the impacts of permitting service committees of Narcotics Anonymous inside and outside the United States to print and distribute NA literature.	**Yes**	**No**	**Abs**
#19	**To direct the WB to create a virtual Institutional Review Board (IRB) to review all researchers and their research questions that request access to the Narcotics Anonymous population through NAWS to conduct research.** Maker: Wisconsin Region Intent: To avoid the misuse of Narcotics Anonymous member information.	**Yes**	**No**	**Abs**
#20	**To direct NAWS to provide at na.org audio recordings of the worldwide webinars on the topics of Public Relations, Hospital &Institution, Step Writing for Inmates, Fellowship Development, Phone Line, and others.** Maker: Wisconsin Region Intent: To provide access to any interested member of Narcotics Anonymous throughout the world so they can hear the Experience, Strength, and Hope (ESH) of members from other geographic parts of the world.	**Yes**	**No**	**Abs**

#21	**To direct NA World Services to remove the Hospitals and Institutions Handbook from the inventory.** Maker: Free State Region Intent: To remove an outdated service manual from WSO inventory	**Yes**	**No**	**Abs**
#22	**If any Motion or Proposal, in Content or Intent, has been submitted and failed to achieve consensus or adoption at two consecutive World Service Conferences, the previously proposed Content and Intent may not be suggested to the Fellowship in the *Conference Agenda Report* (*CAR*)/ Conference Approval Track (CAT) or at the WSC for one entire conference cycle.** Maker: Southern California Region Intent: To use the Fellowship's decision-making processes and time responsibly and effectively.	**Yes**	**No**	**Abs**
#23	**All in-person and virtual World Service Conferences will be streamed to provide access to NA members in English audio.** Maker: Kentuckiana Bluegrass Appalachian Region Co-makers: Upper Rocky Mountain Region, Russian-Speaking Zone, Western Russia Region, North-West Russia Region Intent: To allow the entire NA membership a better understanding of what takes place at the World Service Conference.	**Yes**	**No**	**Abs**
#24	**All Conference Participant webinars will be streamed to provide access to NA members in English audio.** Maker: Kentuckiana Bluegrass Appalachian Region Co-makers: Upper Rocky Mountain Region, Russian-Speaking Zone, Western Russia Region, North-West Russia Region Intent: To allow the entire NA membership a better understanding of what takes place during CP Webinars.	**Yes**	**No**	**Abs**
#25	**All votes and straw polls on motions that were included in the *Conference Agenda Report* or the Conference Approval Track, not to include election ballots, will be displayed in real time for all Conference Participants to see, showing who voted and how they voted.** Maker: Kentuckiana Bluegrass Appalachian Region Co-makers: Russian-Speaking Zone, Western Russia Region, North-West Russia Region Intent: To see how each Conference Participant votes on each motion.	**Yes**	**No**	**Abs**

Items in blue with an asterisk come from motions the WSC has already approved to create project plans. The date in parentheses is the year the motion was passed.

Members can fill out this survey online at www.na.org/survey until 1 April 2023.

NEW RECOVERY LITERATURE (CHOOSE UP TO 3)	
No new literature	
No new recovery lit	
New literature to support stepwork	
Booklet of Step study questions taken from Chapter Four, "How It Works," in the Basic Text	
Step working booklet focused mainly on Steps 1–3, aimed primarily at new members and those in treatment and drug courts	
Step working guide aimed at members not new to working the Steps	
Create a new IP or booklet	
DRT/MAT as it relates to NA* (2018)	
On using social media in NA* (2018)	
Members' experience, strength, and hope on trustworthiness and trusting the process	
IP for a daily personal gratitude inventory	
Personal stories about relationships and families in recovery	
An IP for newcomers containing the NA suggestions	
An IP focused on meditation	
Dealing with trauma/PTSD in recovery	
Spirituality in service: Atmosphere of recovery and spiritual benefits of service	
Dealing with grief in recovery	
Spirituality in NA: What does it mean that NA is a spiritual, not religious program? Including a list of spiritual principles with definitions	
Targeted literature	
Literature for women in recovery* (2020)	
Literature for atheists and agnostics	
Literature for younger members	
Literature for older members	
Literature for experienced members/"oldtimers"	
Literature for LGBTQ+ members	
Literature for First Nations/indigenous members	
Literature for members who are veterans	
Other	
Other:	

Members can fill out this survey online at www.na.org/survey until 1 April 2023.

REVISIONS TO EXISTING RECOVERY LITERATURE (CHOOSE UP TO 2)	
No revisions	
No revisions to recovery literature	
Revise an existing piece of NA literature	
Add "gender" to "What is the NA Program?" to read: "Anyone may join us regardless of age, race, gender, sexual identity, creed, religion or lack of religion."	
Review currently approved recovery literature to gender neutralize NA literature, where possible	
Revise and simplify the *Step Working Guides*	
Revise the *Sponsorship* book	
Revise *Recovery and Relapse*	
Revise *Accessibility for Those with Additional Needs*	
Revise *Am I an Addict?*	
Revise *H&I Service and the NA Member*	
Revise *PI and the NA Member*	
Revise *The Concepts* booklet	
Other	
Other:	

Members can fill out this survey online at www.na.org/survey until 1 April 2023.

NEW SERVICE MATERIAL (CHOOSE UP TO 3)	
Public relations	
PR video explaining what NA is, how it works, and how to contact us* (2020)	
Our public image: creating confidence in NA	
More social media guidelines above and beyond the service pamphlet	
More short, focused PR resources such as tools to assist in reaching the medical community, criminal justice, and those who refer people to NA	
Sponsorship behind the Walls basics	
Internal PR basics	
Cooperation, not affiliation—our relationship to others, including AA	
NA services 101	
Virtual service basics (including virtual service meetings, virtual meetings and areas participating in the service system, virtual workshops and trainings, etc.)	
The impact of technology on services and workloads	
Best practices for service workshops	
Carrying the NA message effectively	
Personal application of Concepts and Traditions, as a member and trusted servant	
Facilitation basics	
What is NA World Services and how does it work?	
Fellowship development basics	
Collaborating among service bodies	
When service bodies split or reunify	
Description of service commitments at areas and regions	
Effective report writing	
Tools for leadership and mentorship, including as they relate to service bodies and new meetings	
Group support forum, local service conference and local service board basics	
Policy in NA—different kinds of policy styles and approaches	
Legal, financial, and Seventh Tradition tools	
Self-support in NA (what it means, how we handle funds, banking, digital fund flow, fundraising, misappropriation, etc.)	
Information for creating legal entities/incorporating	
How do we protect the NA message and carry the message? (understanding the *FIPT* and the issues around illicit literature, local websites, virtual meetings, etc.)	
Area treasurers' and budgeting basics	

Members can fill out this survey online at **www.na.org/survey** until 1 April 2023.

REVISIONS TO EXISTING SERVICE MATERIAL (CHOOSE UP TO 2)	
Revise existing service material	
Update *A Guide to Local Services in NA* (*GLS*)	
Revise *Translation Basics*	
Revise and update *Planning Basics*	
Revise and update *PR Basics*	
Revise and update *H&I Basics*	
Revise and update the service pamphlet *Disruptive and Violent Behavior* to reflect current practices in the Fellowship, and include the issue of sexual predators	
Revise and update the service pamphlet *Group Business Meetings*, with a section on using a CBDM process, and the concept of delegation	
Other	
Other:	

Members can fill out this survey online at www.na.org/survey until 1 April 2023.

ISSUE DISCUSSION TOPICS (CHOOSE UP TO 3)	
IDTs for the next cycle	
Gender-neutral and inclusive language in NA literature	
Reimagining and revitalizing service committees (to further the reach of the NA message, improve communication, provide mentorship and training, and make service more attractive and accessible, learning from our experience the past few years)	
Dealing with disruptive and predatory behavior	
Self-support in NA: Seventh Tradition and Eleventh Concept	
The *Fellowship Intellectual Property Trust* (*FIPT*)	
Our Symbol—a closer look	
The importance of our Traditions to NA	
Group conscience and consensus-based decision making	
PR basics—what they are and why they are important	
Spiritual principles and service	
Social media and PR issues	
Making NA accessible for those with additional needs	
Building our unity while respecting our differences	
Retaining members in NA	
Illness/medication and our literature	
Other	
Other:	

Glossary

Area Service Committee (ASC)
The area committee is the primary means by which the services of a local NA community are administered. The ASC is composed of group service representatives, administrative officers (chairperson, vice chairperson, secretary, treasurer), subcommittee chairpersons or project leaders, and the area's regional committee members. The ASC elects its own officers, subcommittee chairpersons or project leaders, and RCMs.

Biennial
Occurring every two years. (Biannual means occurring twice a year.)

Candidate Profile Report (CPR)
A packet containing information (individual reports) on each candidate nominated by the Human Resource Panel for consideration for election by the WSC. These reports are intended to assist conference participants in their evaluations of candidates.

CBDM
Consensus-based decision making. Consensus refers to the consent of the group, meaning the willingness on the part of all members of a group to move forward with a decision. The conference uses a form of CBDM that is based on respect for all persons involved in the decision being considered, but does not necessarily mean the final decision is unanimous. For decision-making purposes, consensus at the World Service Conference is defined as 80% of participants in agreement.

***Conference Agenda Report* (*CAR*)**
A publication that consists of business and issues that will be considered during the WSC meeting. The *CAR* is released a minimum of 150 days prior to the opening of the conference, with translated versions released a minimum of 120 days prior. The *CAR*, in all the languages in which it is published, is available at no charge on the Web at www.na.org/conference.

Conference Approval Track (CAT)
A term used to describe items posted for conference participants' consideration 90 days prior to the World Service Conference. Typically included are the WSC seating report, the draft budget, the NAWS Strategic Plan and proposed project plans for the upcoming conference cycle, material being presented for consideration under the service material approval process, and any regional ideas submitted for conference consideration.

Conference-Approved
There are three different approval tracks for NA material: Conference-approved, Fellowship-approved, and World Board–approved. Conference-approved material includes NA handbooks and service booklets that tend to convey NA's fundamental ideas about certain areas of service. These pieces may or may not have been sent out for review and input according to the specifics of the project plan presented to the WSC. Conference-approved material is included in the Conference Approval Track material for approval at the upcoming WSC, unless the board decides there is enough interest to include the material in the *Conference Agenda Report*. Both Conference-approved and World Board–approved materials are intended to show how to implement, or put into practice, the principles established by core NA philosophy and Fellowship-approved literature. (See the literature and service materials list in Addendum E for more information.)

Conference Cycle

The years between World Service Conferences. For the current conference cycle, that refers to the three fiscal years running from 1 July 2020 to 30 June 2023. [The timing of the 2020–2022 conference cycle was disrupted by the pandemic.]

Conference Participants (CP)

For the purposes of decision making, participants are defined as regional delegates, zonal delegates, and World Board members. Only delegates vote on items that have appeared in the *Conference Agenda Report*, with the exception of the approval of new pieces of recovery literature. Only regional delegates participate in these votes.

***Conference Report* (*CR*)**

This report is posted shortly before the World Service Conference to help participants prepare for the WSC. Regional reports are posted online along with the *Conference Report*, and delegates and regions may also have articles published.

Environmental Scan

An environmental scan is part of a strategic planning process. Preliminary to the creation of our strategic plan each cycle, World Services looks at internal and external factors that might influence the work we are able to accomplish or that we wish to take on or prioritize. [Due to the disruption in services resulting from the pandemic, we did not undertake our planning process, including the environmental scan, in the 2020–2023 conference cycle.]

Fellowship-Approved

As explained in *GWSNA*: "All NA recovery material is Fellowship-approved. This means that it is developed by NA World Services, sent out to the Fellowship for review and input, and ultimately sent out for approval by the Fellowship in the *Conference Agenda Report*. . . . This applies to all recovery books, recovery booklets, and recovery pamphlets as well as material that establishes or changes philosophical position or NA principles." (See the literature and service materials list in Addendum E for more information.)

Fellowship Development (FD)

We engage in a large variety of activities that are directed to members and/or designed to help NA communities in their efforts to carry the NA message and to further our primary purpose and vision. This includes, but is certainly not limited to, holding web meetings and webinars on topics of Fellowship interest, publishing *Reaching Out*, participating in Fellowship workshops and in public relations activities, answering emails and calls from members, and providing free or reduced-cost literature for communities in need. We refer to all of this activity as Fellowship development, since that is its purpose.

***Fellowship Intellectual Property Trust* (*FIPT*)**

A legal trust that serves as custodian for NA's recovery literature and logos (trademarks) approved by the Fellowship in April 1993. The *FIPT*'s purpose is to ensure that NA's property is held in trust for all of NA and kept safe for members yet to come, in keeping with our primary purpose. The document creating the *FIPT* is called a *trust instrument*; it explains how NA's literature and trademarks are managed and protected for the benefit of the Fellowship as a whole. For more information, see **www.na.org/fipt**.

Group Support Forum (GSF)

A discussion-oriented body focused on the needs of the groups. Group support forums are open to all members and oriented toward group issues, orientation, and training.

***Guide to Local Services in Narcotics Anonymous, A* (*GLS*)**
A service handbook, approved in 1997, intended to serve as a resource for NA groups, areas, regions, and their subcommittees in establishing and providing local services.

***Guide to World Services in Narcotics Anonymous, A* (*GWSNA*)**
A compilation of policy decisions that have been approved by the World Service Conference, including WSC guidelines. The name was changed from *A Temporary Working Guide to Our World Service Structure* (*TWGWSS*) in 2002. TWGSS, its precursor, was first published in 1983 as the temporary successor to the *NA Service Manual* (aka *The NA Tree*), which in turn was first published in 1976.

Human Resource Panel (HRP)
Provides the World Service Conference with a list of qualified candidates for election to the World Board, the Human Resource Panel, and the WSC Cofacilitator positions. Is also responsible for administering the World Pool. Consists of four members elected by the WSC.

Hybrid
Recovery or service meeting that has both in-person and remote attendees.

IP
Acronym for informational pamphlet.

Issue Discussion Topics (IDT)
Specific topics that concern the Fellowship as a whole, to be discussed by the Fellowship during the conference cycle. For more information, see **www.na.org/idt**.

Local Service Board (LSB)
An administrative body overseen by the local service conference. The LSB is responsible for administering the work prioritized by the LSC and coordinating its meetings.

Local Service Conference (LSC)
A strategic, planning-oriented service body. LSCs deliver services through a mixture of project-based workgroups, ongoing services performed by committees, and services organized by coordinators, depending on local need. They primarily utilize consensus-based decision making.

Local Service Toolbox Project
Project approved at WSC 2020. For more information, see **www.na.org/toolbox**.

NA Way Magazine, The
Published quarterly, *The NA Way Magazine* currently offers articles about service, recovery-oriented stories, and entertainment, as well as a calendar of international NA events. Available by request in English, Farsi, French, German, Japanese, Portuguese, Russian, and Spanish, and posted at **www.na.org/naway**. [Due to the disruption in services resulting from the pandemic, *The NA Way* has not been published since January 2020.]

NAWS
Acronym for Narcotics Anonymous World Services.

NAWS Annual Report
An annual publication providing an overview of NAWS activities and finances for each fiscal year.

NAWS News

A newsletter posted by the World Board three or four times a year reporting on their current activities. Published in English, Farsi, French, German, Portuguese, Spanish, and Swedish and posted at www.na.org/nawsnews.

Project Plan

Developed by the World Board for all prospective, non-routine World Service projects. Includes the proposed scope of the project, a budget, and a timeline. Included in the Conference Approval Track material as part of the budget and approved by delegates at each conference.

Public Relations (PR)

Creating and maintaining relationships with members, potential members, and the general public, including professionals, families, and loved ones, in an effort to more effectively carry the NA message of recovery.

RBZs

Candidates for nomination to World Service positions who have been put forward by regions, the World Board, or zones. These potential candidates are interviewed by the Human Resource Panel. (For more information, see page 43 of this *CAR*.)

Reaching Out

A quarterly World Services publication to help incarcerated addicts connect to the NA program and to enhance H&I efforts.

Regional Assembly

A gathering of group service representatives (GSRs) and regional committee members (RCMs) conducted by the regional service committee, to discuss regional issues and those affecting NA worldwide, usually in preparation for the WSC meeting. The regional delegate is sometimes elected at the assembly.

Regional Delegate (RD)

Attends the WSC as a voting participant from an NA region (or equivalent service body). Is responsible for helping with communication between the region and World Services throughout the conference cycle.

Regional Service Committee (RSC)

A body that draws together the combined service experience of a number of adjoining areas for mutual support of and service to those areas. Composed of RCMs, the regional delegate, alternate delegate, and others as needed.

Role of Zones Project

Project approved at WSC 2020, focused on bringing zones together to discuss best practices and service innovations and improve communication and collaboration.

Service Pamphlets (SPs)

Pamphlets intended for use as a resource for groups and service bodies covering some topics related to service in NA. These pamphlets are developed, released for a 90-day delegate review, and approved by the World Board, who can also revise them if the need arises. They are the board's best attempt at collecting some of the more successful practices in our Fellowship in dealing with sensitive or difficult topics.

Service System

The service system in NA consists of four main components: people, processes, resources, and structure. The Service System Project was created to take an overall view of how to improve local services and address some of the long-standing challenges in service delivery. For more information, see the project page at **www.na.org/servicesystem**.

Strategic Plan

A long-term strategy for World Services to provide new or improved services and support that facilitates the continuation and growth of Narcotics Anonymous worldwide. The project plans typically stem from the objectives in the strategic plan.

Straw Poll (see also Vote)

A nonbinding poll conducted to gauge the general sentiment of the conference toward a particular topic or idea. Often motions or amendments are straw polled more than once before a vote is taken. Straw polls are also used during the closing session of the conference to ensure that the conference has a common understanding of the week's decisions and discussions.

Twelve Concepts for NA Service

Fundamental NA principles guiding our groups, boards, and committees in service affairs. Fellowship-approved in 1992; published as a self-titled booklet with essays and study questions.

Virtual Meeting

Any NA meeting that is not held in-person. This includes meetings that meet online and via phones. See *Virtual Meeting Basics* posted on **www.na.org/virtual** for more information.

Vision for NA Service, A

A view of what our services are striving to accomplish that serves to guide and inspire us. Approved unanimously by WSC 2010 after being included in that year's *Conference Agenda Report*.

Vote

A vote happens when the body makes a decision on an item. See page 8 of *A Guide to World Services in NA* for a list of decision-making sessions at the conference.

Webinars/Web Meetings

Virtual meetings or workshops. Sometimes webinars consist of a presentation followed by questions and answers. Sometimes they are more interactive, in which case we refer to them as "web meetings." World Services hosts quarterly webinars on topics of Fellowship interest and web meetings related to PR, H&I, regional service offices, and ongoing projects. Virtual workgroups also meet through web meetings, and the Board holds web meetings for conference participants.

Workgroups and Focus Groups

Small working bodies responsible to the World Board, created for a specific purpose.

World Board

The World Board is the service board of the World Service Conference. The board provides support to the Fellowship of Narcotics Anonymous in the Fellowship's effort to carry the message of NA, and oversees the activities of NA World Services, including our primary service center, the World Service Office. The board also holds in trust for the NA Fellowship the rights for all its physical and intellectual properties (which include literature, logos, trademarks, and copyrights) in accordance with the will of the Fellowship as expressed through the delegates at the WSC.

World Board–Approved

Service-related informational pamphlets and tools approved and published by the World Board after a 90-day delegate review period. This material contains practical experience gathered from the Fellowship about how to apply some of the principles contained in NA Fellowship- and Conference-approved material. (See the literature and service materials list in Addendum E for more information.)

World Pool

A pool of members' information demonstrating a variety of recovery- and service-related experience as well as any skills necessary for the successful completion of world-level service assignments. All NA members with over five years clean are eligible to enter the World Pool.

World Service Conference (WSC)

The conference is not an entity; it is an event—the coming together of the NA Fellowship from around the globe. It consists of regional and zonal delegates, the members of the World Board, and the executive director of the World Service Office who meet to discuss questions of significance to the Fellowship of Narcotics Anonymous. The World Service Conference is the one point in our structure where the voice of NA as a whole can be heard regarding issues and concerns affecting our worldwide Fellowship. The conference is a vehicle for Fellowship communication and unity, a forum where our common welfare is itself the business of the meeting.

World Service Office (WSO)

The name of the physical location of the primary worldwide service center for NA World Services. The headquarters is located in Chatsworth (Los Angeles), California, USA, with branch facilities in Canada, Belgium, Iran, and India. The WSO prints, stocks, and sells NA Fellowship-, World Board-, and Conference-approved literature, service handbooks, and other materials; provides support for NA groups and communities; and serves as a clearinghouse for information about NA. "The basic purposes of our world services are communication, coordination, information, and guidance. " (*GWSNA*, p. 2)

WSC Cofacilitator(s)

Two individuals who preside over the *CAR*- and CAT-related Discussion and Decisions sessions of the World Service Conference. Elected by the World Service Conference.

Zonal Delegate (ZD)

Attends the WSC as a voting participant from an existing NA zone with two or more unseated regions or communities. Is responsible for helping with communication between the zone and World Services throughout the conference cycle.

Zonal Forums

Service-oriented sharing and/or business sessions composed of multiple regions that provide means by which NA communities can communicate, cooperate, and grow with one another.

Addendum A

Fellowship Intellectual Property Trust and Operational Rules

Clean Copy of Proposed Revisions

Approved Edition
Registered 1 July 1993
Proposed changes for 2023 Conference Agenda Report

The Fellowship Intellectual Property Trust

Approved by the Fellowship of Narcotics Anonymous
as given voice by its groups through their regional service representatives
at the World Service Conference on 27 April 1993

Operational Rules revised by the regional service representatives
at the World Service Conference on 30 April 1997, 27 April 1998, and 1 May 2012

TABLE OF CONTENTS

INSTRUMENT

Article I

Section 1: Name of the Trust 1
Section 2: Creation of the Trust 1
Section 3: Nature of the Trust 1
Section 4: Purpose of the Trust 1
Section 5: No bond required 1

Article II: Parties to the Trust 1

Article III: Identity of Trust Property 2

Article IV: Operational Rules 2

Article V

Section 1: Trustee's duties 2
Section 2: Delegation of duties 3
Section 3: Trustee's standard of care 3
Section 4: Trustee's powers 3
Section 5: Limitation 4
Section 6: Indemnification of Trustee 4
Section 7: Nonpartisan activities by the Trustee 5

Article VI: Revocability 5

Article VII: Termination 5

Article VIII: Jurisdiction 5

Article IX: Trust registration 5

OPERATIONAL RULES

Article I: Background, purpose, and parties of the Trust

Section 1: Background of the Trust 6
Section 2: Purpose of these rules 7
Section 3: Parties of the Trust
Trustor 7
Trustee 8
Beneficiary 8

Article II: Intellectual properties held in trust

Section 1: Twelve Steps, Twelve Traditions 9
Section 2: Other recovery literature 9
Section 3: Trademarks, service marks 9
Section 4: Copyrights 9
Section 5: Nature of ownership of the Trust's copyrighted recovery literature 10

Article III: Rights and responsibilities of the Trustor

Section 1: General rights and responsibilities 11
Section 2: WSC boards and committees 11
Section 3: Addition, revision, or deletion of properties from the Trust 11

Article IV: Rights and responsibilities of the Trustee

Section 1: Identification of Trustee 12
Section 2: General responsibilities for Trust properties 12
Section 3: Fiduciary relationship to Trustor 12
Section 4: Trustee compensation 12
Section 5: Registration of Trust properties 12
Section 6: Manufacture, distribution, and sale of products 13
Section 7: Trustee authority without notice or permission 13
Section 8: Trustee obligation for notice and approval 14
Section 9: Utilization of revenues 14
Section 10: Disbursement of Trust revenue 14
Section 11: Protection of Trust properties 15
Section 12: Trustee reporting obligation 15

Article V: Rights and responsibilities of the Beneficiary

Section 1: Fellowship use of Trust properties 16
Section 2: Beneficiary impact on Trust 16
Section 3: Inspection of Trust activities 16

Article VI: Revocation and reassignment of the Trustee's rights and responsibilities

Section 1: Consideration of revocation 18
Section 2: Revocation process 18
Section 3: Reassignment of Trustee responsibilities 19

Article VII: Revision of Trust Rules and Instrument

Section 1: Revision of Trust Operational Rules 20
Section 2: Revision of Trust Instrument 20

Schedule A: Twelve Steps and Twelve Traditions, as adapted for use by the Fellowship of Narcotics Anonymous

Twelve Steps 21
Twelve Traditions 22

READER'S NOTES

Introduction 23
Trust Instrument 24
Trust Operational Rules 31
Glossary 39

NA INTELLECTUAL PROPERTY BULLETINS

NA Intellectual Property Bulletin #1

Internal Use of NA Intellectual Property 43

NA Intellectual Property Bulletin #2

Individual NA Member Use of Narcotics Anonymous Trademarks 45

NA Intellectual Property Bulletin #3 and 3A

Use of Narcotics Anonymous Trademarks by Commercial Vendors 47
Commercial Vendors Permit Application and Request Form 49

NA Intellectual Property Bulletin #4

Reprinting NA Fellowship-approved Literature 51

NA Intellectual Property Bulletin #5

Conflict Resolution Within the NA Fellowship 53

INSTRUMENT: THE FELLOWSHIP INTELLECTUAL PROPERTY TRUST

ARTICLE I

Section 1: Name of the Trust

The name of this trust shall be "The Fellowship Intellectual Property Trust."

Section 2: Creation of the Trust

The Trustor, the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference, does hereby reaffirm and restate its transfer, assignment, and conveyance of all NA recovery literature, trademarks, service marks, and all other intellectual property to Narcotics Anonymous World Services, Inc. as Trustee, to hold and administer in accordance with this Trust document and its purpose.

Section 3: Nature of the Trust

The Trustee shall hold the Trust Properties as a perpetual charitable trust, subject to revocation by the Trustor, and shall use the properties and income derived therefrom exclusively for the charitable and educational purposes described in the statement of purpose below, and for the payment of the incidental expenses and costs of the administration of the Trust.

Section 4: Purpose of the Trust

The sole object and purpose of this Trust is to hold and administer all recovery literature and other intellectual properties of the Fellowship of Narcotics Anonymous in a manner that will help addicts find recovery from the disease of addiction and carry that message of recovery to the addict who still suffers, in keeping with the Twelve Steps and Twelve Traditions of NA.

Section 5: No bond required

The Trustor waives the requirement that the Trustee give a bond to secure performance of the Trustee's duties.

ARTICLE II: PARTIES TO THE TRUST

The Fellowship of Narcotics Anonymous, as given voice by its groups through their delegates at the World Service Conference (WSC), is the Settlor and the Trustor. The delegates are the representatives elected by the regions and zones seated at the World Service Conference. Narcotics Anonymous World Services, Inc. is the Trustee of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust.

ARTICLE III: IDENTITY OF TRUST PROPERTY

The Trust Property includes all recovery literature, trademarks, service marks, copyrights, and all other intellectual property of the Fellowship. From time to time, the Trustor may add to, modify, or delete property from the Trust. All additions made to the Fellowship's recovery literature, trademarks, service marks, copyrights and all other intellectual property by Narcotics Anonymous World Services, Inc. shall additionally be considered property subject to this Trust. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is designated as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

ARTICLE IV: OPERATIONAL RULES

The Trustor shall generate Trust Operational Rules which shall be controlling on the Trust and the parties thereto except if such Rules conflict with the terms of this Instrument.

ARTICLE V

Section 1: Trustee's duties

The Trustee has the following general duties with respect to administration of the Trust:

1. The Trustee has a duty to administer the Trust according to the Trust Instrument and, except to the extent that this document provides otherwise, according to the statutes of California.
2. The Trustee shall follow written direction given to it from time to time by the Trustor. However, if a written direction would have the effect of modifying the Trust, the Trustee has no duty to follow it unless it complies with the requirements for modifying the Trust herein.
3. The Trustee has a duty to administer the Trust solely in the interest of the Beneficiary and the Trustor.
4. The Trustee has a duty to deal impartially with the Beneficiary.
5. The Trustee has a duty not to use or deal with Trust Property for the Trustee's own profit or for any other purpose unconnected with the Trust, nor to take part in any transaction in which the Trustee has an interest adverse to the Beneficiary or the Trustor.
6. The Trustee has a duty to take, keep control of, and preserve the Trust Property.
7. The Trustee has a duty to make the Trust Property productive.

8. The Trustee has a duty to keep the Trust Property separate from other property not subject to the Trust, and to see that the Trust Property is clearly designated.
9. The Trustee has a duty to take reasonable steps to enforce claims that are part of the Trust Property.
10. The Trustee has a duty to take reasonable steps to defend actions that may result in a loss to the Trust, and to prosecute actions to protect the Trust Property.

Section 2: Delegation of duties

The Trustee shall not delegate to others the performance of acts that the Trustee itself can reasonably be required to perform, and may neither transfer the office of Trustee to another nor delegate the entire administration of the Trust to another entity. All other matters may be delegated, but where the Trustee has properly delegated a matter to an agent, employee, or other person, the Trustee has a duty to exercise reasonable supervision over the person or entity performing the delegated matter.

Section 3: Trustee's standard of care

The Trustee shall administer the Trust with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims to accomplish the purposes of the Trust as determined from the Trust Instrument.

Section 4: Trustee's powers

The Trustee has the following powers: the powers conferred by the Trust Instrument; the powers conferred by statute, except as limited in the Trust Instrument; and the power to perform any act that a Trustee would perform for the purposes of the Trust under the Trustee's standard of care, except as limited in the Trust Instrument. The exercise of a power by the Trustee is subject to the Trustee's fiduciary duties to the Beneficiary and the Trustor. Under this document, the Trustee has the following powers:

1. The power to collect, hold, and retain Trust Property.
2. The power to receive additions of property to the Trust.
3. The power to participate in the operation of any business that is part of the Trust, and to change the legal form of the business.
4. The power to manage and control Trust Property, and to manage, control, and divide proceeds and assets generated from the manufacture or sale of products derived from Trust Property.
5. The power to encumber, mortgage, or pledge any portion of the Trust Property except those copyrights, trademarks, and service marks held by the Trust.
6. The power to enter into a lease for any purpose.
7. The power to insure the Trust Property against damage or loss and to insure the Trustee against third-party liability.

8. The power to prudently borrow money for any Trust purpose, to be repaid from proceeds from the sale of products generated from Trust Property.
9. The power to pay, contest, or settle claims against the Trust by compromise, arbitration, or otherwise, and the additional power to release in whole or in part any claim belonging to the Trust.
10. The power to pay taxes, assessments, reasonable compensation of the Trustee and of employees and agents of the Trust, and other expenses incurred in the collection, care, administration, and protection of the Trust.
11. The power to hire people, including accountants, attorneys, auditors, investment advisors, or other agents, even if they are associated or affiliated with the Trustee, to advise or assist the Trustee in the performance of administrative duties.
12. The power to execute and deliver all instruments which are needed to accomplish or facilitate the exercise of the powers vested in the Trustee.
13. The power to prosecute or defend actions, claims, or proceedings for the protection of the Trust Property and of the Trustee in the performance of the Trustee's duties. [1]

Section 5: Limitation

The Trustee is not granted the power to make loans to the Beneficiary either out of Trust Property or out of proceeds from the sale of products generated from Trust Property, or to guarantee loans to the Beneficiary by encumbrances on either Trust Property or proceeds from the sale of products generated from Trust Property.

Section 6: Indemnification of Trustee

To the fullest extent permitted by law, the Trustor shall indemnify the Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in that code section, and including an action by or in the right of the Trustee, by reason of the fact that the person is or was a person described in that code section. Procedures for the approval of indemnity, advancement of expenses, and insurance shall be described in the Trustee's bylaws.

The Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, may not be relieved of liability for breach of Trust committed intentionally, with gross negligence, in bad faith, or with reckless indifference to the interests of the Beneficiary or the Trustor, or for any act wrongfully consented to by the Beneficiary or the Trustor.

[1] For details, see page 15, "Protection of Trust Properties."

Section 7: Nonpartisan activities by the Trustee

The Trustee shall be nonprofit and nonpartisan. No part of the activities of the Trustee shall consist of the publication or dissemination of materials with the purpose of attempting to influence legislation, and the Trustee shall not participate or intervene in any political campaign on behalf of any candidate for public office or for or against any cause or measure being submitted to the people for a vote.

ARTICLE VI: REVOCABILITY

This Trust is revocable by the Trustor.

ARTICLE VII: TERMINATION

This Trust will terminate when any of the following occurs:

1. The Trust purpose is fulfilled;
2. The Trust purpose becomes unlawful;
3. The Trust purpose becomes impossible to fulfill; or
4. The Trustor revokes the Trust.

On termination of the Trust, the Trustee continues to have the powers reasonably necessary under the circumstances to wind up the affairs of the Trust. On termination of the Trust, the Trust Property is to be disposed of as determined by the Trustor. If no such determination is made, the Trust Property shall be transferred to the Trustor.

ARTICLE VIII: JURISDICTION

The Superior Court of the State of California has exclusive jurisdiction of proceedings concerning the internal affairs of the Trust, and has concurrent jurisdiction over actions and proceedings to determine the existence of the Trust, actions and proceedings by or against creditors or debtors of the Trust, and actions and proceedings involving the Trustee and third persons, in accordance with California Probate Code Section 17000.

There is no right to a jury trial in proceedings under the California Probate Code concerning the internal affairs of the Trust.

ARTICLE IX: TRUST REGISTRATION

The Trustee shall register the Trust document with the California Attorney General, and shall perform all obligations attendant thereto.

The instrument was signed by Vivienne Long, RSR, San Diego-Imperial Region, designated signator for the Trustor; K. Joseph Gossett, Executive Director, WSO, Inc., Trustee; and Mary Kay Berger, Chairperson, Board of Directors, WSO, Inc., Trustee. It was registered with the Attorney General for the State of California, USA, on 1 July 1993.

OPERATIONAL RULES: THE FELLOWSHIP INTELLECTUAL PROPERTY TRUST

ARTICLE I: BACKGROUND, PURPOSE, AND PARTIES OF THE TRUST

SECTION 1: BACKGROUND OF THE TRUST

The foundation for the Fellowship Intellectual Property Trust was laid, in fact, at the 1st World Convention of Narcotics Anonymous, held November 5, 1971, in La Mirada, California, USA. At that convention, the membership of the Fellowship of Narcotics Anonymous directed its World Service Board of Trustees to establish a World Service Office to serve as a central Fellowship contact point, an NA information clearinghouse, and NA's publishing agency. Since that time, the World Service Office has been the Narcotics Anonymous Fellowship's authorized publisher, holding the Fellowship's intellectual property in trust as a fiduciary of the Fellowship's primary service arms, the World Service Board of Trustees (through 1976) and the World Service Conference (WSC) (from 1976 to the present).

The WSO's (known as Narcotics Anonymous World Services, Inc. (NA World Services) since 1998) role as Fellowship publisher has been described in every approved NA service manual, from the first edition of *The NA Tree* (1975) to the most recent edition of *A Guide to World Services in NA,* as follows: "[Another] major function of WSO is the publication and distribution of literature, which includes the printing, warehousing, and distribution of all existing literature."

On 15 September 1982, the trust relationship was reinforced when the WSC Literature Committee specifically conveyed the copyright to the book *Narcotics Anonymous,* NA's Basic Text, to World Service Office, Inc., such specific trust to be administered in accordance with the direction of the WSC as given at its annual meeting of 5–9 May 1982.

In 1988, the trust relationship was further reinforced when the WSC approved guidelines for the WSC Literature Committee which read, in part: "After the World Literature Committee has completed its work on a piece of literature, it is turned over to the World Service Office for production and distribution. Production involves copyright registration... Literature is then sold through WSO."

Finally, in 1991, the WSC reaffirmed the trust relationship that had been established over the years between the Fellowship of Narcotics Anonymous, the World Service Conference, and World Service Office, Inc. This was accomplished by the approval of motions which read as follows:

> *To reaffirm and ratify that the ownership of all of NA's intellectual and physical properties prepared in the past, and to be prepared into the future, is held by WSO, Inc., which holds such title in trust on behalf of the Fellowship of Narcotics*

Anonymous as a whole, in accordance with the decisions of the World Service Conference.

To reaffirm that the World Service Office, Inc., is the exclusive publisher and distributor of all World Service Conference-approved literature, including all books, pamphlets, handbooks, and other intellectual and physical properties, as directed by the Fellowship of Narcotics Anonymous through the World Service Conference.

The World Service Office Board of Directors is entrusted with the responsibility for protecting the Fellowship's physical and intellectual properties, including the Basic Text, and at the [discretion of the] Board of Directors... shall take legal action to protect those rights against any and all persons who choose to infringe upon this literature trust.

At the WSC in 1997, the name "regional service representative" was changed to "regional delegate". At the WSC in 1998, the name of the legal entity "World Service Office, Inc." was changed to "Narcotics Anonymous World Services, Inc." (NA World Services). The directors of Narcotics Anonymous World Services, Inc. are referred to as World Board members. These name changes are reflected in this document except when used in a historical context.

At the WSC in 2018, zonal delegates from zones with two or more unseated communities were recognized as full voting delegates, along with regional delegates. At the WSC in 2023, the terms "regional delegate" and "RD" were replaced with the term "delegate."

SECTION 2: PURPOSE OF THESE RULES

These rules describe the way the Fellowship Intellectual Property Trust is to be administered. They describe the intellectual properties held by the Trust, the parties to the Trust, the rights and responsibilities of each of those parties, and the relationship between them. They also describe specific means by which the rights and responsibilities of the Trustee can be revoked and reassigned, and the procedure to be used in altering specific provisions of the Trust Instrument itself.

SECTION 3: PARTIES OF THE TRUST

Trustor: The Fellowship of Narcotics Anonymous as given voice by its groups through their delegates at the World Service Conference (WSC). The delegates are the representatives elected by the regions and zones seated at the WSC.

Equitable ownership of the recovery literature, trademarks, service marks, and all other intellectual properties of the Fellowship of Narcotics Anonymous resides with the Fellowship itself, the basic collective unit of which is the NA group. Decisions concerning NA's intellectual properties directly affect each individual NA group as well as NA as a whole. For this reason, such decisions are made by the duly authorized representatives of the NA groups, their regional and zonal delegates, when those delegates gather at NA's World Service Conference. By such means, the Fellowship of Narcotics Anonymous acts as the Trustor of the Fellowship Intellectual Property

Trust and is responsible for the creation, approval, revision, and decommissioning of NA recovery literature, trademarks, service marks, and other intellectual properties. The Trustor's specific rights and responsibilities are detailed in Article III of these rules and in the currently applicable service manuals.

Trustee: Narcotics Anonymous World Services, Inc.

Narcotics Anonymous World Services, Inc. is the Trustee of the Fellowship Intellectual Property Trust, responsible to hold, register, use, and protect the licenses, copyrights, trademarks, service marks, and other intellectual properties composing the Trust Property. The Trustee is responsible to use or regulate the use of those intellectual properties in a manner consistent with the instructions of the Trustor in service to the Beneficiary, the Fellowship of Narcotics Anonymous as a whole. The Trustee's specific rights and responsibilities are detailed in Article IV of these rules.

Beneficiary: the Fellowship of Narcotics Anonymous as a whole

The Beneficiary of the Fellowship Intellectual Property Trust is the Fellowship of Narcotics Anonymous as a whole. The Beneficiary's specific rights and responsibilities are detailed in Article V of these rules.

ARTICLE II: INTELLECTUAL PROPERTIES HELD IN TRUST

SECTION 1: TWELVE STEPS, TWELVE TRADITIONS

By license agreement with Alcoholics Anonymous World Services, Inc., the Trust holds all rights to the Twelve Steps and Twelve Traditions as adapted for use by the Fellowship of Narcotics Anonymous, listed in Schedule A of these rules.

SECTION 2: OTHER RECOVERY LITERATURE

By assignment from the Trustor, the Trust holds all other recovery literature created directly or indirectly by the Trustor, the Beneficiary, and/or the Trustee. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is marked as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

SECTION 3: TRADEMARKS, SERVICE MARKS

Trademarks and service marks held by the Trust include, but are not necessarily limited to, the name "Narcotics Anonymous," the stylized NA initials in a double circle, the four-sided diamond enclosed in a circle touching all four of its points, and the original NA group logo. The Trust holds legal title to such marks and all translated, adapted, and hybrid forms of such marks.

SECTION 4: COPYRIGHTS

The Trust holds legal title to the copyrights for all books, booklets, pamphlets, and audio and/or video recordings, both in original and in translation, that have been approved by the WSC or its predecessors. The Trust holds legal title to the copyrights for all literary works in progress, both in original and in translation, developed by the WSC, through the World Board.

SECTION 5: NATURE OF OWNERSHIP OF THE TRUST'S COPYRIGHTED RECOVERY LITERATURE

The creation of all new or revised Trust literary properties will be commissioned by the Trustor, either directly or through a subordinate board of the WSC. The process used to create those properties, from commencement to conclusion, will be under the constant control of the Trustor, exercised directly or by the World Board. The Trustor authorizes the Trustee to make non-substantive corrections to Trust literary properties as those needs arise and to create enhanced electronic or digital versions of texts that include supplemental material or connections to other NA materials, so long as the Trustee provides not less than 120 days prior notice of such proposed corrections or enhancements to the fellowship.[2] Individuals who take part in the creation of those properties will do so as employees of either the Trustor or the Trustee, whether salaried or volunteer, with full knowledge of the commissioning and controlling interests of the Trustor. No individual participant in any project designed to create or revise Trust recovery literature will retain any claim of copyright with respect to their contributions thereto. The ownership of these Trust Properties will be registered in the name of the Trustee.

[2] The actual language adopted at WSC 2012 reads:

> To allow the World Board to make non-substantive corrections to Fellowship Approved literature which do not impact the original meaning of the Fellowship Approved text and which fix typographical errors, obsolete references, references to outdated literature, and other similar corrections. The World Board will announce such corrections not less than 120 days in advance of publication.
>
> To allow the World Board the ability to create and approve enhanced electronic or digital versions of texts that include supplemental materials or connections to other NA materials. The World Board will announce such enhancements not less than 120 days in advance of publication.

ARTICLE III: RIGHTS AND RESPONSIBILITIES OF THE TRUSTOR

SECTION 1: GENERAL RIGHTS AND RESPONSIBILITIES

The Fellowship of Narcotics Anonymous as given voice by its groups through their delegates at NA's World Service Conference, as Trustor, has sole authority to approve any proposed revision of the NA Fellowship's adaptation of the Twelve Steps and Twelve Traditions. The Trustor and its designated agents have sole authority to commission, direct, and approve the creation and revision of books, booklets, and informational pamphlets for and on behalf of the NA Fellowship. The Trustor and its designated agents have sole authority to create or revise trademarks and service marks for and on behalf of the NA Fellowship.

SECTION 2: THE WORLD BOARD

The World Service Conference of Narcotics Anonymous accomplishes its tasks, including those tasks having to do with the Trust, through the World Board, which has oversight of the activities of Narcotics Anonymous World Services, Inc. The WSC elects the members of the World Board, and may delegate portions of its authority to the World Board. However, in all matters and at all times, the World Board is subject to the direction of the WSC.

The specific purpose, function, authority, and composition of the World Board , and the relationship between the World Board and the WSC, is described in the relevant guidelines and handbooks approved by the WSC.

SECTION 3: ADDITION, REVISION, OR DELETION OF PROPERTIES FROM THE TRUST BY THE TRUSTOR

The Trustor may add properties to the Trust, delete properties from the Trust, or revise the content or nature of Trust Properties by the following means:

1. Proposals must be distributed to NA groups through their delegates no less than ninety days prior to the meeting of the WSC at which the proposals will be considered.
2. For such a proposal to be approved, two-thirds of the delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal.

ARTICLE IV: RIGHTS AND RESPONSIBILITIES OF THE TRUSTEE

SECTION 1: IDENTIFICATION OF TRUSTEE

Narcotics Anonymous World Services, Inc. a California nonprofit public benefit corporation, is Trustee of the Fellowship Intellectual Property Trust. Its bylaws are filed with the California Secretary of State.

SECTION 2: GENERAL RESPONSIBILITIES FOR TRUST PROPERTIES

The Trustee shall hold in a fiduciary capacity the right to control and use all Trust Properties, and specifically to manufacture and sell products generated from Trust Properties, so long as the Trustee's actions are not inconsistent with the directions of the Trustor.

SECTION 3: FIDUCIARY RELATIONSHIP TO TRUSTOR

The Trustee is a service entity which functions within the totality of the Fellowship of Narcotics Anonymous and, in so doing, endorses the aims, goals, and purposes of the Fellowship. The Trustee, including its members, officers, and employees, is and shall be subject to, and will abide by, the principles of the Twelve Traditions of Narcotics Anonymous as set forth in the book *Narcotics Anonymous*.

Further, the Trustee shall abide by motions adopted by the Trustor at each WSC meeting, and shall implement decisions reached by the Trustor as they pertain to the administration of the Trust. This applies even to decisions reached by the Trustor which have the effect of modifying either the Trust Operational Rules or the Trust Instrument, provided those decisions are reached in a way that is consistent with Article VII of these Rules. It is herein specifically acknowledged that the Trustee acts as a fiduciary in its dealings with and on behalf of the Trustor.

SECTION 4: TRUSTEE COMPENSATION

Board members and officers of the corporation serving as Trustee shall serve without compensation, but may be reimbursed for expenses they incur in their service to the Trust.

No board member, officer, employee, or other person connected with the Trustee, or any other private individual, shall receive at any time any of the net earnings or pecuniary profit generated by the Trust; provided, however, that this provision shall not prevent payment to any such person of reasonable compensation for services rendered to or for the Trustee in furtherance of its purposes.

SECTION 5: REGISTRATION OF TRUST PROPERTIES

The Trustee shall take all reasonable measures to register and protect the Trust's copyrights, trademarks, and service marks, both in their original forms and in their translated, adapted, or hybrid forms, in the United States and other countries where

those properties are used or are likely to be used, in accordance with the provisions of United States law and all applicable international intellectual property rights treaties.

SECTION 6:
MANUFACTURE, DISTRIBUTION, AND SALE OF PRODUCTS

The Trustee shall use, produce, print, manufacture, and/or reproduce products using Trust Properties, and shall offer such products for sale to the Beneficiary and the general public. The Trustee may enter into appropriate agreements and arrangements with third parties regarding the manufacture, distribution, and sale of products using Trust Properties.

SECTION 7:
TRUSTEE AUTHORITY WITHOUT NOTICE OR PERMISSION

In the absence of the Trustor's specific direction to the contrary, the Trustee may make the following decisions relative to administration of the Trust without prior notice to or permission of the Trustor:

1. The Trustee has complete discretion as to the manufacturing format of products generated from Trust Properties, including appearance, design, typeface, paper grade, binding, cover, ink, or other material.
2. The Trustee has complete discretion in the management of all affairs related to the perpetuation of the Trust's business, including contracts, leases, licenses, covenants, manufacturing specifications, inventory and production quantities, distribution and marketing policies and programs, and pricing of products generated from Trust Properties.
3. The Trustee has the complete discretion to make non-substantive corrections to Trust literary properties as those needs arise. *(see footnote 2, page 10)*
4. The Trustee has the authority to bundle, excerpt, and repackage Trust Properties.[3]
5. The Trustee has complete discretion to create enhanced electronic or digital versions of Trust Properties that include supplemental materials and connections to other fellowship materials. *(see footnote 2, page 10)*

[3] The actual language adopted at WSC 2012 reads:

> To allow the World Board to bundle, excerpt, and repackage Fellowship Approved literature without changes to the texts themselves. The World Board will announce these actions not less than 120 days in advance of publication.

SECTION 8: TRUSTEE OBLIGATION FOR NOTICE AND APPROVAL

Other than alterations that consist of non-substantive corrections, bundling, excerpting, and/or repackaging, or enhanced electronic versions of Trust Properties, the Trustee must notify the Trustor at least ninety days prior to any given WSC meeting of the Trustee's intent to publish or otherwise manufacture a product based on an alteration of any Trust Property. The Trustee may not publish or manufacture such a product prior to receiving the Trustor's approval at that meeting. For such a proposal to be approved, two-thirds of the delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal. Where an alteration consists of a non-substantive correction, bundling, excerpting or repackaging, or an enhanced electronic version of Trust Properties, the Trustee shall provide not less than 120 days prior written notice to the Trustor of its intent to publish that product. *(See footnote 2, page 10 and footnote 3, page 13)*

SECTION 9: UTILIZATION OF REVENUES

From the revenues accruing from licenses, covenants, or sale of products generated from Trust Properties, the Trustee shall provide services as directed by the WSC, including but not limited to the following:

1. The Trustee shall provide administrative, organizational, and logistical services to the World Service Conference of Narcotics Anonymous and the Fellowship of Narcotics Anonymous at large.
2. The Trustee shall provide service to individual addicts and groups of addicts seeking recovery from addiction, and shall assist the general public in understanding addiction and the Narcotics Anonymous program for recovery from addiction. Such assistance may include direct and indirect communication with addicts, organizations, agencies, governments, and the public at large.
3. The Trustee shall publish and distribute periodicals written or prepared by and/or for the WSC.
4. The Trustee shall not utilize revenues generated from Trust Properties to engage in any activities or exercise any powers that are not in furtherance of the primary purpose of Narcotics Anonymous, which is to carry the NA message to the still-suffering addict.

SECTION 10: DISBURSEMENT OF TRUST REVENUE

The Trustee shall hold and manage in a fiduciary capacity the income produced by any of the activities described in Article IV, Sections 6 and 9, of these Rules in such a manner as to further the purpose described in Article I, Section 4, of the Trust Instrument.

SECTION 11: PROTECTION OF TRUST PROPERTIES

The Trustee shall have the duty and authority to protect the Trust Properties from infringement. The Trustee will utilize the following process to proceed with protection of the Trust Properties.

1. Before legal proceedings are initiated, the Trustee will request that all infringing parties cease and desist their infringement.
2. The Trustee will seek to resolve the infringement prior to filing formal litigation.
3. Prior to filing a lawsuit for infringement, at least three-quarters of the World Board members of Narcotics Anonymous World Services, Inc. must approve the action.
4. Prior to filing, the Trustee will report to the Trustor by sending notice to the delegates from WSC-seated regions and zones its intent to file an infringement suit, unless the provision of such a report would demonstrably impair the Trustee's ability to effectively protect Trust Property. In the event that prior notice of intention to protect the intellectual properties of the Trust would jeopardize the success of any action, appropriate provisions or remedies such as injunctions and seizure orders may be sought without prior notice.
5. Once an infringement lawsuit is filed, settlement shall be at the discretion of the Trustee.

SECTION 12: TRUSTEE REPORTING OBLIGATION

Each year, the Trustee shall give a full written report of its activities to the Trustor. This report shall be delivered to the Trustor at or before the meeting of the WSC, and shall be available at cost or less to any Narcotics Anonymous member. This report shall include:

1. A year-end financial report for each fiscal year.
2. A description of all Trustee activities funded from proceeds generated by the Trust in the fiscal year.
3. A budget and project description for Trustee activities planned for the coming conference cycle.

An audit of the Trust for each fiscal year will be provided, upon completion, to all delegates of the WSC as Trustor. This audit shall be performed by an independent certified public accountant. Additionally, the Trustor may elect to instruct the Trustee to perform a review of operational practices and policies, above and beyond the review of internal controls and procedures which is conducted annually.

ARTICLE V: RIGHTS AND RESPONSIBILITIES OF THE BENEFICIARY

SECTION 1: FELLOWSHIP USE OF TRUST PROPERTIES

Use of NA's copyrights, trademarks, and service marks by NA groups, service boards, and committees is covered in a separate document called "Internal Use of NA Intellectual Property."

SECTION 2: BENEFICIARY IMPACT ON THE TRUST

The Beneficiary may take part in decisions affecting the Trust through the established Narcotics Anonymous service structure as described in the most recent Narcotics Anonymous service manual.

SECTION 3: INSPECTION OF TRUSTEE ACTIVITIES

The Fellowship of Narcotics Anonymous, as given voice by its groups through their delegates at the WSC, is the Settlor and the Trustor of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. Only the Trustor can request and conduct an inspection of Trustee activities on behalf of the Trust Beneficiary. With the exception of any subject and items excluded by law, there are no limitations on what the Trustor can inspect.

Under Article IV, Section 12 of the Operational Rules, and consistent with California law, Narcotics Anonymous World Services, Inc., as Trustee, is required to, among other things: (1) prepare a year-end financial report for each fiscal year; (2) cause an audit of the Trust activities for each fiscal year to be performed by an independent certified public accountant that includes the revenues and expenses relating to the Trust Properties; and (3) provide a copy of both the financial report and independent audit to all participants of the WSC.

If, after a review of the financial report and independent audit, a member or any component of the NA service structure has questions or concerns, they can contact the World Board. If questions or concerns still remain after contacting the World Board, they would then be discussed through the established Narcotics Anonymous service structure. A request for an inspection can be initiated by any seated region or zone, through its elected delegate, submitting a request by motion to the Trustor, at the World Service Conference, through the *Conference Agenda Report*.

The standard threshold of two-thirds of voting participants at the WSC required to make a decision is changed in this Section 3 to a simple majority (50% plus one).

ARTICLE VI: REVOCATION AND REASSIGNMENT OF THE TRUSTEE'S RIGHTS AND RESPONSIBILITIES

SECTION 1: CONSIDERATION OF REVOCATION

The Trustee's rights and responsibilities may be revoked and reassigned to another party by the Trustor, provided the following conditions are met:

1. A written petition to revoke the rights and responsibilities of the Trustee must be submitted to the WSC. To be considered, the petition must meet one of the following conditions:
   Either the petition must be signed by a third of the delegates recognized as voting participants in the most recent meeting of the WSC,
   Or the petition must be signed by no less than two-thirds of the World Board
2. In order to be considered at the next meeting of the WSC, such a petition must be received by 1 September of the year prior to the next WSC, allowing time for the petition to be distributed to the Trustor.
3. If the above criteria are met, the petition will be placed on the agenda of the next meeting of the WSC. Statements of the petitioners will be published with the petition itself in the *Conference Agenda Report.*

SECTION 2: REVOCATION PROCESS

1. A two-thirds majority of delegates must approve before proceeding with the revocation process.
2. An ad hoc committee will be appointed. The committee will consist of the following:
   a. four delegates
   b. the World Board chairperson and three members of the World Board, one of whom will chair the committee
3. This committee will hold two forums during the upcoming conference cycle to receive Fellowship input, and will provide accounts of those forums to the Trustor.
4. In addition to those forums, the committee will meet at least twice, and will provide accounts of its meetings to the Trustor.
5. At the conclusion of its study, this committee will prepare a written report to be included in the next *Conference Agenda Report,* along with any motions or recommendations related to the proposed revocation.
6. Any motion to revoke the Trustee's rights and responsibilities arising from the committee's study will require approval of two-thirds of the delegates recorded as present in the WSC roll call immediately prior to the vote.

SECTION 3: REASSIGNMENT OF TRUSTEE RESPONSIBILITIES

Should the Trustee's rights and responsibilities be revoked, the Trustor will immediately direct the Trustee to assign those rights and responsibilities either to the

Trustor or to the entity the Trustor wishes to administer the Trust. The Trustee shall comply immediately with such direction.

ARTICLE VII: REVISION OF TRUST RULES AND INSTRUMENT

SECTION 1: REVISION OF TRUST OPERATIONAL RULES

The Trust Operational Rules may be revised by the "yes" vote of two-thirds of those regional delegates recorded as present in the WSC roll call immediately prior to the vote.

SECTION 2: REVISION OF TRUST INSTRUMENT

Provisions of the Trust Instrument may be changed only under the following conditions:

1. Any motion to review proposed revisions to the Trust Instrument must receive the approval of a two-thirds majority of delegates at the WSC.
2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the *Conference Agenda Report* for adoption.
3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of "yes" from two-thirds of those delegates recorded as present in the WSC roll call immediately prior to the vote.

SCHEDULE A: TWELVE STEPS AND TWELVE TRADITIONS, AS ADAPTED FOR USE BY THE FELLOWSHIP OF NARCOTICS ANONYMOUS

License to adapt the Twelve Steps and Twelve Traditions for use by the Fellowship of Narcotics Anonymous granted by Alcoholics Anonymous World Services, Inc.

Twelve Steps

1. We admitted that we were powerless over our addiction, that our lives had become unmanageable.
2. We came to believe that a Power greater than ourselves could restore us to sanity.
3. We made a decision to turn our will and our lives over to the care of God *as we understood Him.*
4. We made a searching and fearless moral inventory of ourselves.
5. We admitted to God, to ourselves, and to another human being the exact nature of our wrongs.
6. We were entirely ready to have God remove all these defects of character.
7. We humbly asked Him to remove our shortcomings.
8. We made a list of all persons we had harmed, and became willing to make amends to them all.
9. We made direct amends to such people wherever possible, except when to do so would injure them or others.
10. We continued to take personal inventory and when we were wrong promptly admitted it.
11. We sought through prayer and meditation to improve our conscious contact with God *as we understood Him,* praying only for knowledge of His will for us and the power to carry that out.
12. Having had a spiritual awakening as a result of these steps, we tried to carry this message to addicts, and to practice these principles in all our affairs.

Twelve Traditions

1. Our common welfare should come first; personal recovery depends on NA unity.
2. For our group purpose there is but one ultimate authority—a loving God as He may express Himself in our group conscience. Our leaders are but trusted servants; they do not govern.
3. The only requirement for membership is a desire to stop using.
4. Each group should be autonomous except in matters affecting other groups or NA as a whole.
5. Each group has but one primary purpose—to carry the message to the addict who still suffers.
6. An NA group ought never endorse, finance, or lend the NA name to any related facility or outside enterprise, lest problems of money, property, or prestige divert us from our primary purpose.
7. Every NA group ought to be fully self-supporting, declining outside contributions.
8. Narcotics Anonymous should remain forever nonprofessional, but our service centers may employ special workers.
9. NA, as such, ought never be organized; but we may create service boards or committees directly responsible to those they serve.
10. Narcotics Anonymous has no opinion on outside issues; hence the NA name ought never be drawn into public controversy.
11. Our public relations policy is based on attraction rather than promotion; we need always maintain personal anonymity at the level of press, radio, and films.
12. Anonymity is the spiritual foundation of all our traditions, ever reminding us to place principles before personalities.

READER'S NOTES

INTRODUCTION

Who says NA literature is *NA* literature? Who "owns" NA's literature and logos? Who may print and distribute our White Booklet, our Basic Text, our Daily Book, our IPs? What is done with the money paid for NA literature? How is that money accounted for? And what can we do if it's used improperly? The answers to these questions form the substance of the Fellowship Intellectual Property Trust.

The purpose of the Fellowship Intellectual Property Trust is to lay out the collective decisions the Narcotics Anonymous Fellowship has made over the years concerning its literature and logos. Anyone who has any questions about how NA literature is to be developed and approved, who "owns" it, how it may be changed and who may change it, who may print it, and what is to be done with the money resulting from its sale can easily refer to the Fellowship Intellectual Property Trust. In this one comprehensive document appear the policies our entire fellowship has created to preserve the integrity of its published message and the accountability of its publishing services.

These policies have been cast as a legal document, a "trust." This has been done, in part, because US law and international treaty regulate the way "intellectual property"—copyrights, trademarks, and other creations of the mind or spirit—should be administered. The legal "trust" framework has been used because it fits the relationship established in Narcotics Anonymous between the fellowship and its service bodies where NA literature and logos are concerned.

The intent of the trust is to provide assurance to our present and future membership that NA's properties are duly protected from misuse by anyone, including our world services. The trust clarifies and limits Narcotics Anonymous World Services' responsibility and authority in administering those properties on the fellowship's behalf. NA's literature and logos belong to no one individual, board, or committee, but are held in trust for the Fellowship of Narcotics Anonymous as a whole. By casting the policies affecting this arrangement as a registered legal document, we ensure that those policies can be enforced, if need be, by the California state government.

TRUST INSTRUMENT

The first of the Trust document's two parts is the legal "Trust Instrument" which is filed with the California attorney general. The instrument describes the relationship between the NA Fellowship, the fellowship's delegates meeting at the World Service Conference (WSC), and Narcotics Anonymous World Services, Inc. in the manner required in registering a charitable trust in California.

ARTICLE I

What "incidental expenses and costs of... administration" are anticipated?

These are the costs that were originally associated with creating the Trust: normal filing fees incurred in registering the trust instrument, attorney's fees for registration and amplification of applicable copyright and trademark registrations, and other incidental costs.

ARTICLE II: PARTIES TO THE TRUST

This article of the trust instrument briefly identifies the three parties of the Fellowship Intellectual Property Trust according to the relations that have developed over the years in Narcotics Anonymous services. Through their delegates, the NA groups make decisions at the WSC about the development, approval, and publication of literature on behalf of the entire NA Fellowship. Once those decisions are made, the approved literature is given in trust to Narcotics Anonymous World Services, Inc., which is expected to publish it in accordance with the directions the fellowship's representatives give it. The literature is created and published to benefit the Fellowship of Narcotics Anonymous as a whole in fulfilling its primary purpose: "to carry the message to the addict who still suffers." In legal trust terminology, this makes the NA Fellowship, through the vote of delegates at the WSC, the *Trustor,* Narcotics Anonymous World Services, Inc. the *Trustee,* and the NA Fellowship, as a whole, the *Beneficiary*.

ARTICLE III: IDENTITY OF TRUST PROPERTY

What is meant by "modify or delete property"?

This refers to the fellowship's ability, as trustor, to revise existing NA literature and/or remove an item from the classification of approved NA literature.

What about coffee cups, the Basic Journal, and other such products?

Coffee cups, chips and medallions, desks, chairs, and computers are all physical properties of the NA World Services corporation. However, any trademarks displayed on those properties are specifically subject to the rules of use described in the intellectual property trust.

ARTICLE IV: OPERATIONAL RULES

This article refers to the Trust Operational Rules. Are the rules separate from the Trust in some way? Aren't they registered as part of the Trust with the attorney general?

Because we are talking about "legal stuff," we need to use our terms in a very precise way here. The *Trust* is a legal *arrangement;* it is not any of the documents associated with it. Both the trust *instrument* and the trust *operational rules* are meant to describe how the Trust works—each, however, speaks to a different audience. The trust instrument, describing the basic legal framework of the arrangement, is written to tell the government that we are settling our intellectual property affairs in a particular order recognizable to the courts. The operational rules serve as our fellowship's internal agreement about the details of the trust's actual administration. The trust instrument is like the articles of incorporation of the trust, and the rules are like its bylaws or guidelines. While only the instrument *must* be registered with the attorney general, the rules are also filed for information purposes. Further, Article IV of the instrument links the operational rules to the trust in such a way that, once the instrument is registered, the rules also become legally binding on all parties of the trust.

ARTICLE V: TRUSTEE

In Section 1, Item 6, what is meant by "take, keep control of, and preserve"?

This means that the trustee (NA World Services) has the duty to receive from the fellowship any intellectual properties that the fellowship decides are to be included in the trust. The trustee must then properly register its possession of the property, preserve it in its original form, use it in the way described in the instrument and rules, and take steps to ensure that others do not misuse the intellectual properties.

In Section 1, Item 7, what is meant by "make the trust property productive"?

The trustee must make the trust property available in some useful form to those who would benefit from it—namely, the NA Fellowship as a whole.

In Section 2, what is meant by "all other matters may be delegated"? What are some examples of acts delegated to others?

The trustee may delegate *portions* of its duties—for instance, it may contract with an attorney to register copyrights for certain trust properties—given reasonable supervision by the trustee. However, the trustee may never transfer or delegate to another entity the *whole* of its administrative duties. The trustee may hire an attorney to represent its interests in a court of law; it may charge an employee with the responsibility to account for the income of trust properties; it may appoint someone to negotiate a business deal on its behalf. However, the trustee may *not* ask someone else to take over the role of trustee itself—at least not on its own authority. Only the trustor can reassign all the rights and responsibilities of the trustee to another party (see the rules, Article VI).

Section 3 seems arbitrary. Why has it been included?

This section could really be labeled the trustee's "oath of office," and it is far from arbitrary. The language in this section has been very carefully crafted and is based on extensive California experience in defining the way in which a trustee can effectively be held accountable. Such a statement of the standard of care the trustee is to be held to is required by California trust law.

In Section 4, what are some examples of "powers conferred by statute"?

As with so much of the language included in the trust instrument, the lead to this section is taken directly from the California Probate Code division on trust law, Section 16200. The specifics are drawn from other sections of the code that describe the powers of trustees (Sections 16201, 16202, 16220-21, 16223-49).

In Section 4, can you clarify some of the powers listed?

While the "legalese" language found in these items is sure to be unfamiliar to most of our members, it is very common to these types of legal documents. We will try to clarify the particular points as best we can.

Item 3. *How could "the legal form of business" be changed?* This item is phrased as if the trustee's corporation—Narcotics Anonymous World Services, Inc.—were being set up at the same time as the trust. Item 3 gives NA World Services. the authority to set up and incorporate a business enterprise so that it can fulfill the rights and responsibilities described in Article IV of the operational rules (print, warehouse, and distribute NA literature, etc.). It also gives NA World Services the authority to modify the way in which the business is set up if such is found to be necessary for the fulfillment of its responsibilities as trustee. (For more on "legal forms of business," see the glossary at the back of this handbook.)

Item 4. *What is meant by "manage and control"?* This item gives the trustee (NA World Services) the responsibility to properly register, protect, and regulate the use and licensing of the trust properties themselves—that is, the copyrights to NA literature and the registrations of our trademarks and service marks. It also gives the trustee the authority to put whatever proceeds or assets might come from the sale of literature (using trust copyrights) or NA memorabilia (using trust trademarks) to whatever uses would most benefit the NA Fellowship.

Item 5. *How, to whom, and why would property be "encumbered, mortgaged, or pledged"?* This is one of the standard clauses in trust instruments. It is usually intended to indicate that the trustee has been granted full authority to manage the trust property, especially for purposes of interaction with financial institutions. This power is very similar to a homeowner's ability to secure a mortgage on the equity in his or her house. It simply means that the trustee could use trust property as collateral in securing a loan, if that were held to be in the best interests of the trust. Note, however, that the most important of the trust properties—our fellowship's name and logos and the copyrights to NA's literature—*cannot* be put up for a loan.

Item 8. *Borrow money from whom? Why does this not say anything about excluding outside enterprises or being self-supporting?* Item 8 allows the trustee to borrow

money in the name of the trust and to use the proceeds from sales of literature (using trust copyrights) or memorabilia (using trust trademarks) to repay the loan without allowing a claim to be made on the trust properties (the copyrights and trademarks) themselves. Most businesses avail themselves of credit-line services offered by financial institutions. It is the belief of the World Board that this service is not an "outside *contribution*" since NA World Services not only repays the principal but also makes interest payments for its use.

Item 9. This item simply authorizes the trustee to settle any legal actions taken against the trust should the trust itself be sued, and to release others from claims arising from disputes initiated by the trustee if such is deemed to be in the best interests of the trust.

Item 11. *Does this include writers? What does "administrative duties" mean?* This item allows the trustee to hire or contract with people specifically to manage affairs related to the trust arrangement itself. Such administrative duties might require the assistance of attorneys to register copyrights and trademarks, accountants to keep track of the proceeds from the sale of literature and memorabilia, or administrative staff to compile necessary reports on trust activities, process trust-related correspondence, or evaluate requests to reprint literature protected by trust copyrights. Editorial staff could be used to draft or edit reports for these purposes, of course, but this item does not give the trustee specific authority to hire writers to help with the drafting or editing of literary projects being developed by the World Board. The authority to spend money generated from the sale of copyrighted literature or memorabilia using trust trademarks to hire staff to provide "administrative, organizational, and logistical services to the WSC" (writers among them, should they be required) is detailed in Article IV, Section 9, Item 1 of the Operational Rules.

Item 12. This item gives the trustee the authority to sign whatever legal documents it must sign in the course of carrying out its responsibilities.

Item 13. This item gives the trustee the authority to defend itself if it is sued and to file its own lawsuits against others, not only to protect the trust property but also to protect the trustee from liability, so long as its actions have been taken within the framework of its duties. Note that the matter of filing suit to protect the fellowship's literature and logos is dealt with in much greater detail in Article IV, Section 11 of the operational rules.

What is the purpose of Section 5? Would it mean that new groups would not be able to get starter kits from NA World Services? Would it mean they couldn't get literature if they couldn't afford it?

Under California trust law, the power to make loans to the beneficiary is one of the standard powers assigned to trustees. Therefore, we must specifically limit this power in our trust's instrument if we do not wish monetary loans to be made from the trust.

This section does not limit the kinds of group service efforts we have come to expect from NA World Services. It does not prevent NA World Services from providing new

groups with starter kits, and it does not restrict NA World Services from making appropriate arrangements to distribute literature at reduced cost or free of charge in cases of need. (See Article IV, Section 9 of the Trust Operational Rules, and specifically Item 2.)

In Section 6, define "indemnify." Is there any insurance policy? A different policy for the World Board? What are some examples of "other persons"? Define "wrongfully consented to"; give possible examples.

To indemnify means "to secure against hurt, loss, or damage." All this section does is provide that none of the persons mentioned will be burned at the stake for making a simple error in judgment made while carrying out their duties, provided the error is made in good faith. The "other persons" referred to could include either those who are contracted to provide specific services for NA World Services or who provide services on a voluntary basis at the behest of the corporation. If any of them are sued for something they've done in the performance of their duties, Article V, Section 6 of the trust instrument requires the trustor to protect them from personal harm.

Early in 1992, NA World Services extended its liability insurance coverage to provide this specific kind of protection for members of the World Board (including its officers), other volunteers on world service business, WSO employees, and those under specific contract to NA World Services. A single policy covers them all. Authorization for such insurance has been specified since 1987 in Article 8 of NA World Services bylaws.

Note that this section does *not* protect board members, officers, employees, or anyone else from any liability that may arise from wanton neglect of their responsibilities or from malicious acts. Nor does this section provide for protection against liability arising from "any act wrongfully consented to by the beneficiary or trustor."

Why can an individual be sued by the trustee (NA World Services) while an individual associated with the trustee cannot be sued for their actions? Why does the trustee have more rights and protection than the beneficiary?

It's true that both the trust instrument and the operational rules have provisions allowing the trustee to file lawsuits to protect both itself and NA's literature and logos. (See instrument, Article V, Section 4, Item 13, and rules, Article IV, Section 11.) To date, the fellowship has stated in no unclear terms that NA World Services is responsible to protect the fellowship's literature and logos from anyone who threatens them, whoever those persons may be. This is simply a restatement of the intent of our First and Fourth Traditions in the context of the entire fellowship's intellectual property rights: No individual NA member, no individual NA group has the right to take action benefiting themselves that would impair our common welfare or negatively impact NA as a whole in any serious way. If the fellowship were to forbid the trustee to protect NA's copyrighted literature from being altered or published at will by individual members or groups, the courts would interpret that as the fellowship's way of saying that they had

abandoned their collective control of the copyrights to NA literature—to put it bluntly, we would lose our copyrights to the Basic Text and all other NA literature.

Let's clarify the matter of lawsuits and the indemnification provided to NA World Services members, employees, and contractors. Indemnification simply provides assurance that those who serve on our World Board or who take employment at NA World Services will not be subject to personal financial ruin if they are sued for doing their jobs. They are given this kind of protection because it is conceivable that people put in such a position on our behalf may need it and because our fellowship has refused to put them in that position without backing them up. This does not give them more rights than the beneficiary. Remember, the beneficiary is "the Fellowship of Narcotics Anonymous *as a whole."* In the normal course of trust activities, NA as a whole is not exposed to any liability at all; only the trustee is exposed to such liability. The only reason the beneficiary, as defined in this trust, is not provided indemnification from liability is because the beneficiary *has* no liability associated with the trust.

Why is Section 7 there?

Organizations taking part in political activities are regulated by the tax authorities in a different way than nonpartisan organizations. Therefore, any public benefit or charitable organization applying for tax exemption must include such a provision in its organizing instrument.

ARTICLE VII: TERMINATION

Under what circumstances could "the trust purpose [be] fulfilled"?

This is a standard provision in the articles of incorporation or bylaws of many nonprofit organizations. The trust purpose may be fulfilled either when addiction disappears or when a cure is found—granted, not a likely occurrence. On the other hand, it could conceivably come to be impossible for the trust purpose to be fulfilled if, for instance, legislation is enacted outlawing the association of known addicts.

ARTICLE VIII: JURISDICTION

Why California and not some other USA state?

Because the standards of accountability that trustees are held to in caring for a trust are far stricter in California than anywhere else in the USA. Registering the Fellowship Intellectual Property Trust in California provides the fellowship with the greatest possible protection. NA World Services has had principle offices and has been registered in the State of California since 1977. The California Attorney General's Office would probably have had some serious questions if we had tried to establish this trust in a state with more lenient standards of care.

Why no jury trial?

Because trusts are subject to probate law, not criminal law, and juries are not used in probate court. This is merely a statement of legal fact concerning all trusts under California law, not a special provision of the Fellowship Intellectual Property Trust.

ARTICLE IX: TRUST REGISTRATION

When the trust was approved, the delegates who voted on the groups' behalf to do so selected one of their members to sign the instrument for them before it was filed with the California attorney general as shown on page 5. The same will have to be done in the future if the instrument is ever revised.

TRUST OPERATIONAL RULES

The next section of the trust document is the working "operational rules," the bylaws or guidelines that control the actual administration of the trust and the relationship between the parties to the trust: the fellowship, its representatives, and Narcotics Anonymous World Services.

ARTICLE I

Section 1

Section 1 provides a brief documentary history of the trust relationship that had already developed between the fellowship, the World Service Office, the World Service Board of Trustees, and the World Service Conference prior to the formal creation of the Fellowship Intellectual Property Trust.

Section 2

Section 2 summarizes the general purpose of the Trust Operational Rules.

Section 3

Section 3 briefly defines and describes the three parties to the Fellowship Intellectual Property Trust: the *Trustor,* the *Trustee,* and the *Beneficiary*. In all trusts, the *trustor* establishes the general policies that guide the administration of the trust property. The *trustee* carries out the trustor's instructions in the day-to-day management of the property of the trust. And the *beneficiary* is the person or group of people in whose interest the trust is managed. In this trust, the trustor is the Fellowship of NA as given voice by its groups through their delegates at the WSC, the trustee is Narcotics Anonymous World Services, Inc., and the beneficiary is the NA Fellowship as a whole. It is our belief that these trust roles line up pretty closely with the roles the delegates, NA World Services, and the fellowship have already come to play in NA's development. With the exception of our narrowed definition of the trustor as the body of delegates, we have not described anything new in the Fellowship Intellectual Property Trust; we have merely tried to mirror the existing service relationships in our fellowship.

The means by which the fellowship acts as trustor is described in a very specific, even peculiar way. What is behind this language?

In developing the trust, we had originally identified the WSC itself as the trustor. Historically, the NA groups have given the conference authority to make decisions

concerning services affecting the entire fellowship, putting it in a good position to act as trustor of the Fellowship Intellectual Property Trust. However, identifying the WSC itself as trustor created two problems.

First, because the trustor must be the actual owner of whatever is being placed into trust, we would have to find a way to identify the fellowship itself as the trustor and, hence, the "equitable" (or moral) owner of NA's literature and logos.

Second, with the approval of *Twelve Concepts for NA Service* in 1992, our fellowship had agreed that decisions affecting the NA message must be decided, in some fashion, by the NA groups. For example, the essay on Concept Two reads, "proposals to change NA's Twelve Steps, Twelve Traditions, name, nature, or purpose should be approved directly by the groups." The NA name, being a registered trademark and service mark, is one of the intellectual properties covered by this trust; the nature and purpose of Narcotics Anonymous are defined by its copyrighted literature, also protected under the Trust. Giving the whole WSC body authority to make decisions about the Fellowship Intellectual Property Trust seemed to run contrary to the spirit of the Twelve Concepts. Somehow, the Trust would have to identify either the NA groups or their direct representatives as the collective trustor.

However, we could not show the duties of the trustor of the Fellowship Intellectual Property Trust as being dissipated among the individual groups because the decisions the trustor has to make affect the fellowship as a whole. To give individual groups the ability to take action on their own that could seriously affect other groups or NA as a whole would contradict our Fourth Tradition. Somehow, we had to provide means by which the groups or their direct representatives could fulfill their responsibilities as trustor in a coordinated way, so that they all took part in decisions affecting them all.

That's how we came to define the trustor as:

1. the Fellowship of Narcotics Anonymous
2. as given voice by its groups
3. through their delegates
4. at the World Service Conference.

The fellowship itself, as given voice by its groups through their delegates at the World Service Conference, elected by regions and zones seated at the WSC, is identified as the Trustor and, therefore, the equitable owner of NA's literature and logos. The NA groups are placed in direct control of the trust because the trust directly affects the interests of each individual NA group. Only their direct representatives, the delegates, are recognized as having the ability to make decisions on their behalf concerning the Trust. The delegates are required to make those decisions only within the context of the WSC, assuring that action affecting the entire fellowship will be conducted in a coordinated fashion.

ARTICLE II

The first four sections of this article simply describe the items that have been placed in trust: NA's Twelve Steps and Traditions, other NA literature, NA's name and marks, and

the copyrights to NA literature. The Trust document regulates the creation, revision, and use of these items in a way consistent with already-approved policy.

Ownership

Throughout Article II, we find statements like this: "The ownership of [our literature] will be registered in the name of the Trustee," Narcotics Anonymous World Services, Inc. Some members might ask, "Does this mean that the fellowship doesn't own its own literature?" The answer to that question is *no.*

Ever since the World Service Office (now called Narcotics Anonymous World Services, Inc.) was created in the early 1970s, it has been the registered *legal* owner of the copyrights to our literature. However, the *equitable* owner of our literature is the fellowship itself, as described in Article I, Section 3 of these rules. Narcotics Anonymous World Services, Inc. is not, after all, a completely independent entity; it is our fellowship's world service corporation. All Article II says is that legal ownership of the fellowship's literature will be registered in the name of the fellowship's legal corporation.

Regarding Section 3, does this include coffee cups, the Basic Journal, and other memorabilia products?

Trademarks and service marks, described in Section 3, are included among the trust properties. Use of these marks on coffee cups, the Basic Journal, or other memorabilia are subject to regulation by the Trustee.

Regarding Section 3, define "hybrid"

Hybrids of the NA logos are fairly common—for instance, the stylized NA initials with the "NA Tree" superimposed.

Does Section 4 affect H&I's "*Reaching Out*" newsletter?

Reaching Out, specifically, is not currently copyrighted because the conference has not given any instructions to restrict its duplication.

Section 5: works made for hire

Section 5 offers a very specific definition of the terms under which NA literature is created and copyrighted. We believe this definition is consistent with precedence, already-established fellowship policy, and our fellowship's philosophy of both the anonymity and the accountability of its trusted servants. When our trusted servants take part in an NA service project, we expect them to do so not to accrue power, property, or prestige to themselves but to unselfishly serve our fellowship. And we expect that our fellowship, through its representatives in the service structure, will have final authority over such projects from start to finish.

Does this mean that no literature will be originated outside the World Board? Is an individual, group, area, or region prohibited from writing literature?

No, to both questions. First, note that this section refers to *all* the world service boards and committees. Material originated in an individual's home, for instance, or in a group,

area, or region would only need to be accompanied by a copyright release before it could be incorporated into the NA literature development process, as has always been the case.

Does this mean that no individual who may have a vast knowledge in a particular area of recovery and/or the fellowship may have his or her name printed?

Though we do not print NA books or pamphlets showing the names of individual authors, that is not what this section refers to. This says that individuals who take any part, big or little, in helping create literature for NA must do so for the fellowship's benefit, not their own. The copyrights will be registered in the trustee's name, protecting the entire fellowship's rights to the literature, *not* in the names of any individuals who may have had a part in the project. Creative members who wish to write and publish their own copyrighted recovery material under their own names are not prohibited from doing so, provided they do not use the NA name or other trademarks.

If the trustor has constant control over literature from commencement to conclusion, does that include area or regional newsletters?

No. This refers only to *trust* literary properties—materials created in the name of NA as a whole. For more information on local newsletters, see the approved *Handbook for NA Newsletters,* available from the World Service Office.

ARTICLE III

In this article, the role of the fellowship in the creation, approval, and revision of NA literature is clearly described: The fellowship, as given voice by its groups through their delegates at the WSC, currently has sole authority to approve or revise NA literature. Primary among the "agents" referred to in Section 1 is the World Service Conference and the World Board through which it does its detail work.

Does the way Section 1 is written exclude the creation of literature, etc., outside of the WSC/NA World Services—for instance, in groups or areas?

No. This says only that the conference has sole authority with regard to literature created "for and on behalf of the NA Fellowship," referring to the *entire* fellowship.

Does this leave anything out (keytags, world convention cups, etc.)?

No. What's being regulated is not the products (keytags, cups) themselves, but the NA trademarks and service marks used in *making* those products—*all* those products, no matter who their manufacturer may be.

Why is Section 2 included in the rules?

To clarify the relationship of the WSC, our fellowship's general decision-making body, with its boards and committees, to the trustor. While the trustor—the delegates at the WSC—has direct authority in matters relating to the intellectual property trust, the trustor has a standing relationship with the World Board which facilitates the actual

work involved in developing new material and revising existing materials within the terms of the trust.

It sounds like the Basic Text and other pieces of NA recovery literature may be revised with only one hundred fifty days notice. Is this true?

Yes, technically speaking. This reflects conference action. However, the same action showed an understanding that the fellowship should be given as much time as possible to review new or revised literature being proposed for its approval.

ARTICLE IV

This article of the operational rules goes into great detail in describing the role, responsibilities, and limitations that have been placed on Narcotics Anonymous World Services, Inc. in administering the fellowship's literature and logos.

Section 3: What is fiduciary relationship?

Section 3 defines the "fiduciary" relationship between the trustor (the body of fellowship delegates) and the trustee (NA World Services). Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property, and may take it back if he or she pleases. This is the fiduciary relationship, and it matches well the arrangements that have been made in past years for the management and protection of NA-approved literature copyrights and logos by Narcotics Anonymous World Services, Inc.

Does Section 4 conflict with the Trust Instrument, Article V, Section 4, Item 11?

No, this section does not conflict with the trustee's authority to hire people, granted in the instrument; it says specifically "that this provision shall *not* prevent payment to any such person of reasonable compensation for services rendered to or for the trustee in furtherance of its purposes."

What are some examples of expenses?

Members of the World Board of NA World Services are routinely compensated for their expenses associated with travel to and from board meetings—airfare, meals, and lodging. Another common expense is for phone calls used to conduct NA World Services board business.

Does this mean non-addict authors for hire? Are more specific guidelines needed?

While there is nothing in this section forbidding the hiring of non-addict authors by NA World Services, WSC guidelines prohibit their use in the development of NA literature (Sec. 3-G). That seems to be sufficiently specific for our purposes.

Regarding Section 7, does Item 1 mean logos can be changed at any time?

If what you mean by "logos" is the Narcotics Anonymous name, the design of the stylized NA initials, the diamond in a circle, or the original NA group logo, the answer is *no.* Changes in those trademarks and service marks can only be made by the fellowship itself as given voice by its groups through their delegates at the conference.

Does Item 2 mean the trustee totally controls pricing of all literature?

Yes—that is, Narcotics Anonymous World Services, Inc. controls the prices at which NA World Services sells materials to others. This has been standard policy since the office's creation.

Section 11: How does the trustee protect the trust property?

This section describes the process to be used in protecting the trust's intellectual properties. It allows Narcotics Anonymous World Services, Inc. to respond in a timely manner to infringement of the trust's copyright, trademark, and service mark registrations, and to inform the fellowship of the problem. It also gives the office the authority to settle the problem in the best interests of the fellowship, provided that the members of the World Board concur. The provisions of Section 11 are consistent with a motion regarding infringement action approved at WSC'91.

Regarding Section 11, Item 5, does this mean that NA World Services can file a lawsuit without telling (or asking) the WSC if it thinks that it may jeopardize the success of that action?

Yes. As we were putting the trust documents together, the only situation in which we imagined this occurring would be if one or more delegates themselves were targets of a particular suit. Note also that the item says that prior notice cannot be withheld unless it "would *demonstrably* impair the trustee's ability to effectively protect the trust property." Should the delegates, as trustor, ever suspect that notice had been withheld without due cause, they could—and should—require NA World Services to demonstrate its case.

Section 12: What is the trustee reporting obligation?

This section lays out the fellowship's requirements for full annual reports from Narcotics Anonymous World Services on its finances and operations, especially as they relate to the fellowship's literature. This section is included to ensure that NA World Services, as trustee, remains fully accountable for the way in which it administers our intellectual property trust.

ARTICLE V

This article describes the role of the beneficiary, the NA Fellowship as a whole, in the trust. One section deserves particular attention: Section 3.

Section 3

This section describes how a member or any component of the NA service structure can make a request if it has concerns about the financial activities associated with the Fellowship Intellectual Property Trust. It describes some of the ways that financial assurance is provided through reporting and independent audits. It then describes a process to use if the seated region or zone has concerns after reviewing the information available. The first step is to contact the World Board. If the concern is still unresolved, the final step is to ask the fellowship to support an inspection through a motion in the Conference Agenda Report. Only the WSC can make the decision to initiate an inspection request, as they speak for the beneficiary and are responsible for the allocation of NA World Services' resources. The standard threshold of two-thirds of voting participants at the WSC required to make a decision would be changed in this case to a simple majority (50% plus one).

Does there need to be a specific "concern" to justify an inspection?

Given the resources that are already used to provide assurance of the financial activities and reporting for NA World Services, any concern should be articulated in a way that clearly outlines the issue and what the region or zone believes should be inspected.

ARTICLE VI

This article provides for a two-stage approach to the revocation and reassignment of trustee rights and responsibilities. The plan is based on the fact that revocation of the trustee's responsibilities would be a major organizational move. Such a move should take place only if there is widespread, serious concern about the trustee's ability to fulfill its responsibilities, and only after thorough review.

Section 1

The first stage of the revocation process describes the means by which it will be determined whether there is substantial concern about the trust's administration. If so, the delegates must then approve *consideration* of a revocation proposal by a majority.

Sections 2, 3

The second stage of the revocation process describes the *actual* consideration, revocation, and reassignment. This stage takes a conference cycle to complete, allowing time for discussion and fellowship input. The committee created to study the revocation proposal is composed of a cross-section of WSC participants, with a member of the World Board chairing the committee. The decision to revoke the trustee's rights and responsibilities requires approval of two-thirds of the delegates, ensuring substantial consensus on so weighty a decision.

ARTICLE VII

This article is a simple process for revision of the Trust Operational Rules and, more significantly, of the Trust Instrument itself. Revision of the Operational Rules can be accomplished on the spot. Revision of the Trust Instrument, however, takes longer. This is to assure that adequate consideration is given such a change.

What happens to the trust when and if the service structure changes?

Article VII of the Trust Operational Rules describes clear procedures by which both the instrument and the rules can be revised to conform with any change in the service structure.

GLOSSARY

A

Arbitration. Specific means by which civil disputes may be settled out of court; in California, regulated by civil code. (Instrument, Article V, Section 4, Item 9)

B

Bond. A deposit guaranteeing performance of an act previously agreed to, which is forfeited if the act is not fulfilled according to terms. (Instrument, Article I, Section 5)

C

Conveyance. The transference of property (esp. real property) from one person to another by any lawful act; in modern use only by deed or writing between living persons. (Instrument, Article I, Section 2)

Copyrights. The exclusive right given by law... to an author, composer, designer, etc. (or his assignee) to print, publish, and sell copies of his original work.

E

Encumber. To burden (a person or an estate) with debts; *esp.* to charge (an estate) with a mortgage. (Instrument, Article V, Section 4, Item 5; and Article V, Section 5)

F

Fiduciary. A *fiduciary relationship* is "one founded on trust or confidence reposed by one person in the integrity and fidelity of another." Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property and may take it back. (Instrument, Article V, Section 4; Operational Rules, Article I, Section 1; and Article IV, Sections 2, 3, and 10)

H

Hybrid trademarks, service marks. The combination of one registered trademark or service mark with one or more other marks, whether registered or not. (Operational Rules, Article II, Section 3; Article IV, Section 5)

I

Indemnification. To secure against hurt, loss, or damage (esp. by means of an insurance policy). (Instrument, Article V, Section 6)

Infringement. A breaking or breach *(of* a law, obligation, right, copyright, patent, etc.); breach, violation. (Operational Rules, Article I, Section 1; Article IV, Section 11)

Injunction. A judicial process by which one who is threatening to invade or has invaded the legal or equitable rights of another is restrained from commencing or continuing such wrongful act, or is commanded to restore matters to the position in which they stood previously to his action. (Operational Rules, Article IV, Section 11, Item 5)

Intellectual property. Creations of the mind or spirit. Types of intellectual property include literature, trademarks, patents, and manufacturing processes, among others.

L

Legal form of business. The organizational type under which a business is registered with the government. Such forms include corporations, foundations, partnerships, and unincorporated associations of individuals. (Instrument, Article V, Section 4, Item 3)

P

Pecuniary profit. An award resulting from a lawsuit. (Operational Rules, Article IV, Section 3)

Performance audit. A meticulous examination of management policies and procedures. (Operational Rules, Article IV, Sections 10 and 12)

Detail: A normal *audit* occurs when a CPA comes into the office, reviews the accounts, prepares the annual financial statements, and certifies the integrity of the books with specific notes. This kind of audit is currently conducted each year at NA World Services, and its results are published in the Annual Report.

A *performance audit* is more complicated, more time-consuming, and vastly more expensive. The accountants come in, review NA World Services financial policies, then track through every aspect of everything NA World Services does that has to do with either incurring expense, paying out money, or receiving payment. Once they've completed their job, they issue a comprehensive report and set of recommendations on NA World Services financial procedures along with the ordinary statements and certification. No performance audit has yet been conducted of NA World Services.

Perpetual charitable trust. *Perpetual* means "never ceasing; continuous; enduring; lasting; unlimited in respect of time." A *charitable trust* is defined as a "fiduciary relationship with respect to property arising as a result of a manifestation of an intention to create it, and subjecting the person by whom the property is held to equitable duties to deal with the property for a charitable purpose." A *charitable purpose* is thought of as the "accomplishment of objectives which are beneficial to the community or area." And a *fiduciary relationship* is "one founded on trust or confidence reposed by one person in the integrity and fidelity of another." (Instrument, Article I, Section 3)

Probate Code, California. The branch of California civil code governing trusts. (Instrument, Article VIII)

Prudence. Ability to discern the most suitable, politic, or profitable course of action, esp. as regards conduct; practical wisdom, discretion. Wisdom; knowledge of or skill in a matter. Foresight; providence. *Note that in the course of California Probate Court action, "prudence" as affecting the administration of trusts has come to describe certain specific standards of care.* (Instrument, Article V, Sections 3 and 4)

R

Ratify. To confirm or make valid (an act, compact, promise, etc.) by giving consent, approval, or formal sanction (esp. to what has been done or arranged for by another). (Operational Rules, Article I, Section 1; Article IV, Section 11, Item 4)

Recovery literature. Any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Register. To make formal entry of (a document, fact, name, etc.) in a particular register; also to get (a document, etc.) entered in the register by the person entitled to do so. (Instrument, Article IX; Operational Rules, Article I, Section 3; Article II, Section 5; Article IV, Section 5)

S

Seizure orders. Court orders to seize a person's property to remedy prior damage to another or to prevent the possibility of further damage. (Operational Rules, Article IV, Section 11, Item 5)

Service marks. A mark or device used to identify a service offered (such as transportation or insurance).

Service materials. Handbooks or other materials intended primarily for use within the context of an NA service board or committee. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Settlor. The dictionary defines *settlor* as "a person who makes a settlement of property." When the trust instrument says that "the Fellowship of Narcotics Anonymous... is the Settlor and Trustor," it means that the fellowship is the creator of both the property being placed in trust and the trust itself, and therefore maintains equitable ownership of the trust property. (Instrument, Article II)

T

Third-party liability. A liability in the nature of a contingent claim, wherein the trustee is not accused of having caused damages and does not claim to have been harmed but is rather held liable for someone else's damages. (Instrument, Article V, Section 4, Item 7)

Trademark. A mark secured by legal registration used by a manufacturer or trader to distinguish his goods from similar wares of other firms; usually a distinctive device or figure, a fancy name or trade name, or the name of an individual or firm, marked or impressed on the article or upon the package, etc., in or with which it is sold.

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Addendum B

Fellowship Intellectual Property Trust and Operational Rules

with Recommended Changes Tracked

Key:

~~Recommended deletion~~

Recommended addition

Approved Edition
Registered 1 July 1993
Proposed changes for 2023 Conference Agenda Report

The Fellowship Intellectual Property Trust

Approved by the Fellowship of Narcotics Anonymous
as given voice by its groups through their regional service representatives
at the World Service Conference on 27 April 1993

Operational Rules revised by the regional service representatives
at the World Service Conference on 30 April 1997, 27 April 1998, and 1 May 2012

TABLE OF CONTENTS

INSTRUMENT

Article I

Section 1: Name of the Trust 1
Section 2: Creation of the Trust 1
Section 3: Nature of the Trust 1
Section 4: Purpose of the Trust 1
Section 5: No bond required 1

Article II: Parties to the Trust 1

Article III: Identity of Trust Property 2

Article IV: Operational Rules 2

Article V

Section 1: Trustee's duties 2
Section 2: Delegation of duties 3
Section 3: Trustee's standard of care 3
Section 4: Trustee's powers 3
Section 5: Limitation 4
Section 6: Indemnification of Trustee 4
Section 7: Nonpartisan activities by the Trustee 5

Article VI: Revocability 5

Article VII: Termination 5

Article VIII: Jurisdiction 5

Article IX: Trust registration 5

OPERATIONAL RULES

Article I: Background, purpose, and parties of the Trust

Section 1: Background of the Trust 6
Section 2: Purpose of these rules 7
Section 3: Parties of the Trust
Trustor 7
Trustee 8
Beneficiary 8

Article II: Intellectual properties held in trust

Section 1: Twelve Steps, Twelve Traditions 9
Section 2: Other recovery literature 9
Section 3: Trademarks, service marks 9
Section 4: Copyrights 9
Section 5: Nature of ownership of the Trust's copyrighted recovery literature 10

Article III: Rights and responsibilities of the Trustor

Section 1: General rights and responsibilities 11
Section 2: WSC boards and committees 11
Section 3: Addition, revision, or deletion of properties from the Trust 11

Article IV: Rights and responsibilities of the Trustee

Section 1: Identification of Trustee 12
Section 2: General responsibilities for Trust properties 12
Section 3: Fiduciary relationship to Trustor 12
Section 4: Trustee compensation 12
Section 5: Registration of Trust properties 12
Section 6: Manufacture, distribution, and sale of products 13
Section 7: Trustee authority without notice or permission 13
Section 8: Trustee obligation for notice and approval 14
Section 9: Utilization of revenues 14
Section 10: Disbursement of Trust revenue 14
Section 11: Protection of Trust properties 15
Section 12: Trustee reporting obligation 15

Article V: Rights and responsibilities of the Beneficiary

Section 1: Fellowship use of Trust properties 16
Section 2: Beneficiary impact on Trust 16
Section 3: Inspection of Trust activities 16
~~Conditions of inspection ..... 16~~
~~Selection of inspection team ..... 16~~
~~Inspection limitation ..... 16~~
~~Report of inspection ..... 17~~

Article VI: Revocation and reassignment of the Trustee's rights and responsibilities

Section 1: Consideration of revocation 18
Section 2: Revocation process 18
Section 3: Reassignment of Trustee responsibilities 19

Article VII: Revision of Trust Rules and Instrument

Section 1: Revision of Trust Operational Rules 20
Section 2: Revision of Trust Instrument 20

Schedule A: Twelve Steps and Twelve Traditions, as adapted for use by the Fellowship of Narcotics Anonymous

Twelve Steps 21
Twelve Traditions 22

READER'S NOTES

Introduction 23
Trust Instrument 24
Trust Operational Rules 31
Glossary 39

NA INTELLECTUAL PROPERTY BULLETINS

NA Intellectual Property Bulletin #1

Internal Use of NA Intellectual Property 43

NA Intellectual Property Bulletin #2

Individual NA Member Use of Narcotics Anonymous Trademarks 45

NA Intellectual Property Bulletin #3 and 3A

Use of Narcotics Anonymous Trademarks by Commercial Vendors 47
Commercial Vendors Permit Application and Request Form 49

NA Intellectual Property Bulletin #4

Reprinting NA Fellowship-approved Literature 51

NA Intellectual Property Bulletin #5

Conflict Resolution Within the NA Fellowship 53

INSTRUMENT: THE FELLOWSHIP INTELLECTUAL PROPERTY TRUST

ARTICLE I

Section 1: Name of the Trust

The name of this trust shall be "The Fellowship Intellectual Property Trust."

Section 2: Creation of the Trust

The Trustor, the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference, does hereby reaffirm and restate its transfer, assignment, and conveyance of all NA recovery literature, trademarks, service marks, and all other intellectual property to Narcotics Anonymous World Services, Inc. as Trustee, to hold and administer in accordance with this Trust document and its purpose.

Section 3: Nature of the Trust

The Trustee shall hold the Trust Properties as a perpetual charitable trust, subject to revocation by the Trustor, and shall use the properties and income derived therefrom exclusively for the charitable and educational purposes described in the statement of purpose below, and for the payment of the incidental expenses and costs of the administration of the Trust.

Section 4: Purpose of the Trust

The sole object and purpose of this Trust is to hold and administer all recovery literature and other intellectual properties of the Fellowship of Narcotics Anonymous in a manner that will help addicts find recovery from the disease of addiction and carry that message of recovery to the addict who still suffers, in keeping with the Twelve Steps and Twelve Traditions of NA.

Section 5: No bond required

The Trustor waives the requirement that the Trustee give a bond to secure performance of the Trustee's duties.

ARTICLE II: PARTIES TO THE TRUST

The Fellowship of Narcotics Anonymous, as given voice by its groups through their ~~regional~~ delegates at the World Service Conference (WSC), is the Settlor and the Trustor. The delegates are the representatives elected by the regions and zones seated at the World Service Conference. Narcotics Anonymous World Services, Inc. is the Trustee of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust.

ARTICLE III: IDENTITY OF TRUST PROPERTY

The Trust Property includes all recovery literature, trademarks, service marks, copyrights, and all other intellectual property of the Fellowship. From time to time, the Trustor may add to, modify, or delete property from the Trust. All additions made to the Fellowship's recovery literature, trademarks, service marks, copyrights and all other intellectual property by Narcotics Anonymous World Services, Inc. shall additionally be considered property subject to this Trust. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is designated as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

ARTICLE IV: OPERATIONAL RULES

The Trustor shall generate Trust Operational Rules which shall be controlling on the Trust and the parties thereto except if such Rules conflict with the terms of this Instrument.

ARTICLE V

Section 1: Trustee's duties

The Trustee has the following general duties with respect to administration of the Trust:

1. The Trustee has a duty to administer the Trust according to the Trust Instrument and, except to the extent that this document provides otherwise, according to the statutes of California.
2. The Trustee shall follow written direction given to it from time to time by the Trustor. However, if a written direction would have the effect of modifying the Trust, the Trustee has no duty to follow it unless it complies with the requirements for modifying the Trust herein.
3. The Trustee has a duty to administer the Trust solely in the interest of the Beneficiary and the Trustor.
4. The Trustee has a duty to deal impartially with the Beneficiary.
5. The Trustee has a duty not to use or deal with Trust Property for the Trustee's own profit or for any other purpose unconnected with the Trust, nor to take part in any transaction in which the Trustee has an interest adverse to the Beneficiary or the Trustor.
6. The Trustee has a duty to take, keep control of, and preserve the Trust Property.
7. The Trustee has a duty to make the Trust Property productive.

8. The Trustee has a duty to keep the Trust Property separate from other property not subject to the Trust, and to see that the Trust Property is clearly designated.
9. The Trustee has a duty to take reasonable steps to enforce claims that are part of the Trust Property.
10. The Trustee has a duty to take reasonable steps to defend actions that may result in a loss to the Trust, and to prosecute actions to protect the Trust Property.

Section 2: Delegation of duties

The Trustee shall not delegate to others the performance of acts that the Trustee itself can reasonably be required to perform, and may neither transfer the office of Trustee to another nor delegate the entire administration of the Trust to another entity. All other matters may be delegated, but where the Trustee has properly delegated a matter to an agent, employee, or other person, the Trustee has a duty to exercise reasonable supervision over the person or entity performing the delegated matter.

Section 3: Trustee's standard of care

The Trustee shall administer the Trust with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims to accomplish the purposes of the Trust as determined from the Trust Instrument.

Section 4: Trustee's powers

The Trustee has the following powers: the powers conferred by the Trust Instrument; the powers conferred by statute, except as limited in the Trust Instrument; and the power to perform any act that a Trustee would perform for the purposes of the Trust under the Trustee's standard of care, except as limited in the Trust Instrument. The exercise of a power by the Trustee is subject to the Trustee's fiduciary duties to the Beneficiary and the Trustor. Under this document, the Trustee has the following powers:

1. The power to collect, hold, and retain Trust Property.
2. The power to receive additions of property to the Trust.
3. The power to participate in the operation of any business that is part of the Trust, and to change the legal form of the business.
4. The power to manage and control Trust Property, and to manage, control, and divide proceeds and assets generated from the manufacture or sale of products derived from Trust Property.
5. The power to encumber, mortgage, or pledge any portion of the Trust Property except those copyrights, trademarks, and service marks held by the Trust.
6. The power to enter into a lease for any purpose.
7. The power to insure the Trust Property against damage or loss and to insure the Trustee against third-party liability.

8. The power to prudently borrow money for any Trust purpose, to be repaid from proceeds from the sale of products generated from Trust Property.
9. The power to pay, contest, or settle claims against the Trust by compromise, arbitration, or otherwise, and the additional power to release in whole or in part any claim belonging to the Trust.
10. The power to pay taxes, assessments, reasonable compensation of the Trustee and of employees and agents of the Trust, and other expenses incurred in the collection, care, administration, and protection of the Trust.
11. The power to hire people, including accountants, attorneys, auditors, investment advisors, or other agents, even if they are associated or affiliated with the Trustee, to advise or assist the Trustee in the performance of administrative duties.
12. The power to execute and deliver all instruments which are needed to accomplish or facilitate the exercise of the powers vested in the Trustee.
13. The power to prosecute or defend actions, claims, or proceedings for the protection of the Trust Property and of the Trustee in the performance of the Trustee's duties. [1]

Section 5: Limitation

The Trustee is not granted the power to make loans to the Beneficiary either out of Trust Property or out of proceeds from the sale of products generated from Trust Property, or to guarantee loans to the Beneficiary by encumbrances on either Trust Property or proceeds from the sale of products generated from Trust Property.

Section 6: Indemnification of Trustee

To the fullest extent permitted by law, the Trustor shall indemnify the Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in that code section, and including an action by or in the right of the Trustee, by reason of the fact that the person is or was a person described in that code section. Procedures for the approval of indemnity, advancement of expenses, and insurance shall be described in the Trustee's bylaws.

The Trustee and its board members, officers, employees, and other persons described in Section 523(a) of the California Corporations Code, including persons formerly occupying any such position, may not be relieved of liability for breach of Trust committed intentionally, with gross negligence, in bad faith, or with reckless indifference to the interests of the Beneficiary or the Trustor, or for any act wrongfully consented to by the Beneficiary or the Trustor.

[1] For details, see page 15, "Protection of Trust Properties."

Section 7: Nonpartisan activities by the Trustee

The Trustee shall be nonprofit and nonpartisan. No part of the activities of the Trustee shall consist of the publication or dissemination of materials with the purpose of attempting to influence legislation, and the Trustee shall not participate or intervene in any political campaign on behalf of any candidate for public office or for or against any cause or measure being submitted to the people for a vote.

ARTICLE VI: REVOCABILITY

This Trust is revocable by the Trustor.

ARTICLE VII: TERMINATION

This Trust will terminate when any of the following occurs:

1. The Trust purpose is fulfilled;
2. The Trust purpose becomes unlawful;
3. The Trust purpose becomes impossible to fulfill; or
4. The Trustor revokes the Trust.

On termination of the Trust, the Trustee continues to have the powers reasonably necessary under the circumstances to wind up the affairs of the Trust. On termination of the Trust, the Trust Property is to be disposed of as determined by the Trustor. If no such determination is made, the Trust Property shall be transferred to the Trustor.

ARTICLE VIII: JURISDICTION

The Superior Court of the State of California has exclusive jurisdiction of proceedings concerning the internal affairs of the Trust, and has concurrent jurisdiction over actions and proceedings to determine the existence of the Trust, actions and proceedings by or against creditors or debtors of the Trust, and actions and proceedings involving the Trustee and third persons, in accordance with California Probate Code Section 17000.

There is no right to a jury trial in proceedings under the California Probate Code concerning the internal affairs of the Trust.

ARTICLE IX: TRUST REGISTRATION

The Trustee shall register the Trust document with the California Attorney General, and shall perform all obligations attendant thereto.

The instrument was signed by Vivienne Long, RSR, San Diego-Imperial Region, designated signator for the Trustor; K. Joseph Gossett, Executive Director, WSO, Inc., Trustee; and Mary Kay Berger, Chairperson, Board of Directors, WSO, Inc., Trustee. It was registered with the Attorney General for the State of California, USA, on 1 July 1993.

OPERATIONAL RULES: THE FELLOWSHIP INTELLECTUAL PROPERTY TRUST

ARTICLE I: BACKGROUND, PURPOSE, AND PARTIES OF THE TRUST

SECTION 1: BACKGROUND OF THE TRUST

The foundation for the Fellowship Intellectual Property Trust was laid, in fact, at the 1st World Convention of Narcotics Anonymous, held November 5, 1971, in La Mirada, California, USA. At that convention, the membership of the Fellowship of Narcotics Anonymous directed its World Service Board of Trustees to establish a World Service Office to serve as a central Fellowship contact point, an NA information clearinghouse, and NA's publishing agency. Since that time, the World Service Office has been the Narcotics Anonymous Fellowship's authorized publisher, holding the Fellowship's intellectual property in trust as a fiduciary of the Fellowship's primary service arms, the World Service Board of Trustees (through 1976) and the World Service Conference (WSC) (from 1976 to the present).

The WSO's (known as Narcotics Anonymous World Services, Inc. (NA World Services) since 1998) role as Fellowship publisher has been described in every approved NA service manual, from the first edition of *The NA Tree* (1975) to the most recent edition of *A Guide to World Services in NA,* as follows: "[Another] major function of WSO is the publication and distribution of literature, which includes the printing, warehousing, and distribution of all existing literature."

On 15 September 1982, the trust relationship was reinforced when the WSC Literature Committee specifically conveyed the copyright to the book *Narcotics Anonymous,* NA's Basic Text, to World Service Office, Inc., such specific trust to be administered in accordance with the direction of the ~~World Service Conference~~WSC as given at its annual meeting of 5–9 May 1982.

In 1988, the trust relationship was further reinforced when the ~~World Service Conference~~WSC approved guidelines for the WSC Literature Committee which read, in part: "After the World Literature Committee has completed its work on a piece of literature, it is turned over to the World Service Office for production and distribution. Production involves copyright registration... Literature is then sold through WSO."

Finally, in 1991, the ~~World Service Conference~~WSC reaffirmed the trust relationship that had been established over the years between the Fellowship of Narcotics Anonymous, the World Service Conference, and World Service Office, Inc. This was accomplished by the approval of motions which read as follows:

> *To reaffirm and ratify that the ownership of all of NA's intellectual and physical properties prepared in the past, and to be prepared into the future, is held by WSO, Inc., which holds such title in trust on behalf of the Fellowship of Narcotics*

Anonymous as a whole, in accordance with the decisions of the World Service Conference.

To reaffirm that the World Service Office, Inc., is the exclusive publisher and distributor of all World Service Conference-approved literature, including all books, pamphlets, handbooks, and other intellectual and physical properties, as directed by the Fellowship of Narcotics Anonymous through the World Service Conference.

The World Service Office Board of Directors is entrusted with the responsibility for protecting the Fellowship's physical and intellectual properties, including the Basic Text, and at the [discretion of the] Board of Directors... shall take legal action to protect those rights against any and all persons who choose to infringe upon this literature trust.

At the ~~World Service Conference~~WSC in 1997, the name "regional service representative" was changed to "regional delegate". At the ~~World Service Conference~~WSC in 1998, the name of the legal entity "World Service Office, Inc." was changed to "Narcotics Anonymous World Services, Inc." (NA World Services). The directors of Narcotics Anonymous World Services, Inc. are referred to as World Board members. These name changes are reflected in this document except when used in a historical context.

At the WSC in 2018, zonal delegates from zones with two or more unseated communities were recognized as full voting delegates, along with regional delegates. At the WSC in 2023, the terms "regional delegate" and "RD" were replaced with the term "delegate."

SECTION 2: PURPOSE OF THESE RULES

These rules describe the way the Fellowship Intellectual Property Trust is to be administered. They describe the intellectual properties held by the Trust, the parties to the Trust, the rights and responsibilities of each of those parties, and the relationship between them. They also describe specific means by which the rights and responsibilities of the Trustee can be revoked and reassigned, and the procedure to be used in altering specific provisions of the Trust Instrument itself.

SECTION 3: PARTIES OF THE TRUST

Trustor: The Fellowship of Narcotics Anonymous as given voice by its groups through their ~~regional~~ delegates at the World Service Conference (WSC). The delegates are the representatives elected by the regions and zones seated at the WSC.

Equitable ownership of the recovery literature, trademarks, service marks, and all other intellectual properties of the Fellowship of Narcotics Anonymous resides with the Fellowship itself, the basic collective unit of which is the NA group. Decisions concerning NA's intellectual properties directly affect each individual NA group as well as NA as a whole. For this reason, such decisions are made by the duly authorized representatives of the NA groups, their regional and zonal delegates, when those ~~RDs~~

delegates gather at NA's World Service Conference. By such means, the Fellowship of Narcotics Anonymous acts as the Trustor of the Fellowship Intellectual Property Trust and is responsible for the creation, approval, revision, and decommissioning of NA recovery literature, trademarks, service marks, and other intellectual properties. The Trustor's specific rights and responsibilities are detailed in Article III of these rules and in the currently applicable service manuals.

Trustee: Narcotics Anonymous World Services, Inc.

Narcotics Anonymous World Services, Inc. is the Trustee of the Fellowship Intellectual Property Trust, responsible to hold, register, use, and protect the licenses, copyrights, trademarks, service marks, and other intellectual properties composing the Trust Property. The Trustee is responsible to use or regulate the use of those intellectual properties in a manner consistent with the instructions of the Trustor in service to the Beneficiary, the Fellowship of Narcotics Anonymous as a whole. The Trustee's specific rights and responsibilities are detailed in Article IV of these rules.

Beneficiary: the Fellowship of Narcotics Anonymous as a whole

The Beneficiary of the Fellowship Intellectual Property Trust is the Fellowship of Narcotics Anonymous as a whole. The Beneficiary's specific rights and responsibilities are detailed in Article V of these rules.

ARTICLE II: INTELLECTUAL PROPERTIES HELD IN TRUST

SECTION 1: TWELVE STEPS, TWELVE TRADITIONS

By license agreement with Alcoholics Anonymous World Services, Inc., the Trust holds all rights to the Twelve Steps and Twelve Traditions as adapted for use by the Fellowship of Narcotics Anonymous, listed in Schedule A of these rules.

SECTION 2: OTHER RECOVERY LITERATURE

By assignment from the Trustor, the Trust holds all other recovery literature created directly or indirectly by the Trustor, the Beneficiary, and/or the Trustee. However, note that NA service handbooks and other service materials approved by NA's World Service Conference are specifically excluded from the purview of this Trust.

Recovery literature should be taken to mean any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. Only NA recovery literature is marked as Fellowship Approved. *Service materials* should be taken to mean those materials intended primarily for use within the context of an NA service board or committee.

SECTION 3: TRADEMARKS, SERVICE MARKS

Trademarks and service marks held by the Trust include, but are not necessarily limited to, the name "Narcotics Anonymous," the stylized NA initials in a double circle, the four-sided diamond enclosed in a circle touching all four of its points, and the original NA group logo. The Trust holds legal title to such marks and all translated, adapted, and hybrid forms of such marks.

SECTION 4: COPYRIGHTS

The Trust holds legal title to the copyrights for all books, booklets, pamphlets, and audio and/or video recordings, both in original and in translation, that have been approved by the ~~World Service Conference~~WSC or its predecessors. The Trust holds legal title to the copyrights for all literary works in progress, both in original and in translation, developed by the ~~World Service Conference~~WSC, ~~its boards, and its committees~~through the World Board.

SECTION 5: NATURE OF OWNERSHIP OF THE TRUST'S COPYRIGHTED RECOVERY LITERATURE

The creation of all new or revised Trust literary properties will be commissioned by the Trustor, either directly or through a subordinate board ~~or committee~~ of the ~~World Service Conference~~WSC. The process used to create those properties, from commencement to conclusion, will be under the constant control of the Trustor, exercised directly or by ~~a subordinate board or committee of the World Service Conference~~the World Board. The Trustor authorizes the Trustee to make non-substantive corrections to Trust literary properties as those needs arise and to create enhanced electronic or digital versions of texts that include supplemental material or connections to other NA materials, so long as the Trustee provides not less than 120 days prior notice of such proposed corrections or enhancements to the fellowship.[2] Individuals who take part in the creation of those properties will do so as employees of either the Trustor or the Trustee, whether salaried or volunteer, with full knowledge of the commissioning and controlling interests of the Trustor. No individual participant in any project designed to create or revise Trust recovery literature will retain any claim of copyright with respect to their contributions thereto. The ownership of these Trust Properties will be registered in the name of the Trustee.

[2] The actual language adopted at WSC 2012 reads:

> To allow the World Board to make non-substantive corrections to Fellowship Approved literature which do not impact the original meaning of the Fellowship Approved text and which fix typographical errors, obsolete references, references to outdated literature, and other similar corrections. The World Board will announce such corrections not less than 120 days in advance of publication.
>
> To allow the World Board the ability to create and approve enhanced electronic or digital versions of texts that include supplemental materials or connections to other NA materials. The World Board will announce such enhancements not less than 120 days in advance of publication.

ARTICLE III: RIGHTS AND RESPONSIBILITIES OF THE TRUSTOR

SECTION 1: GENERAL RIGHTS AND RESPONSIBILITIES

The Fellowship of Narcotics Anonymous as given voice by its groups through their ~~regional~~ delegates at NA's World Service Conference, as Trustor, has sole authority to approve any proposed revision of the NA Fellowship's adaptation of the Twelve Steps and Twelve Traditions. The Trustor and its designated agents have sole authority to commission, direct, and approve the creation and revision of books, booklets, and informational pamphlets for and on behalf of the NA Fellowship. The Trustor and its designated agents have sole authority to create or revise trademarks and service marks for and on behalf of the NA Fellowship.

SECTION 2: ~~WSC BOARDS AND COMMITTEES~~THE WORLD BOARD

The World Service Conference of Narcotics Anonymous accomplishes its tasks, including those tasks having to do with the Trust, through ~~subsidiary boards and committees~~the World Board, which has oversight of the activities of Narcotics Anonymous World Services, Inc. ~~The conference may dissolve existing boards and committees and create new boards and committees.~~ The ~~conference~~ World Service Conference~~WSC~~ ~~may select the leadership and composition~~elects the members of the World Board, and may ~~of its boards and committees. The conference may~~ delegate portions of its authority to ~~its subsidiary~~the World B~~b~~oard~~s and committees~~. However, in all matters and at all times, ~~these boards and committees are~~the World Board is subject to the direction of the ~~World Service Conference~~WSC.

The specific purpose, function, authority, and composition of the World Board ~~each of the conference's standing subsidiary boards and committees~~, and the relationship between ~~them~~ the World Board and the ~~conference~~WSC, is described in the relevant guidelines and handbooks approved by the ~~World Service Conference~~WSC. ~~The conference regulates its ad hoc committees through motions passed at its biennial meeting, recorded in its minutes.~~

SECTION 3: ADDITION, REVISION, OR DELETION OF PROPERTIES FROM THE TRUST BY THE TRUSTOR

The Trustor may add properties to the Trust, delete properties from the Trust, or revise the content or nature of Trust Properties by the following means:

1. Proposals must be distributed to ~~the~~ NA groups ~~via~~ through their ~~regional~~ delegates no less than ninety days prior to the ~~biennial~~ meeting of the ~~World Service Conference~~WSC at which the proposals will be considered.
2. For such a proposal to be approved, two-thirds of the ~~regional~~ delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal.

ARTICLE IV: RIGHTS AND RESPONSIBILITIES OF THE TRUSTEE

SECTION 1: IDENTIFICATION OF TRUSTEE

Narcotics Anonymous World Services, Inc. a California nonprofit public benefit corporation, is Trustee of the Fellowship Intellectual Property Trust. Its bylaws are filed with the California Secretary of State.

SECTION 2: GENERAL RESPONSIBILITIES FOR TRUST PROPERTIES

The Trustee shall hold in a fiduciary capacity the right to control and use all Trust Properties, and specifically to manufacture and sell products generated from Trust Properties, so long as the Trustee's actions are not inconsistent with the directions of the Trustor.

SECTION 3: FIDUCIARY RELATIONSHIP TO TRUSTOR

The Trustee is a service entity which functions within the totality of the Fellowship of Narcotics Anonymous and, in so doing, endorses the aims, goals, and purposes of the Fellowship. The Trustee, including its members, officers, and employees, is and shall be subject to, and will abide by, the principles of the Twelve Traditions of Narcotics Anonymous as set forth in the book *Narcotics Anonymous*.

Further, the Trustee shall abide by motions adopted by the Trustor at each ~~World Service Conference~~WSC meeting, and shall implement decisions reached by the Trustor as they pertain to the administration of the Trust. This applies even to decisions reached by the Trustor which have the effect of modifying either the Trust Operational Rules or the Trust Instrument, provided those decisions are reached in a way that is consistent with Article VII of these Rules. It is herein specifically acknowledged that the Trustee acts as a fiduciary in its dealings with and on behalf of the Trustor.

SECTION 4: TRUSTEE COMPENSATION

Board members and officers of the corporation serving as Trustee shall serve without compensation, but may be reimbursed for expenses they incur in their service to the Trust.

No board member, officer, employee, or other person connected with the Trustee, or any other private individual, shall receive at any time any of the net earnings or pecuniary profit generated by the Trust; provided, however, that this provision shall not prevent payment to any such person of reasonable compensation for services rendered to or for the Trustee in furtherance of its purposes.

SECTION 5: REGISTRATION OF TRUST PROPERTIES

The Trustee shall take all reasonable measures to register and protect the Trust's copyrights, trademarks, and service marks, both in their original forms and in their

translated, adapted, or hybrid forms, in the United States and other countries where those properties are used or are likely to be used, in accordance with the provisions of United States law and all applicable international intellectual property rights treaties.

SECTION 6:
MANUFACTURE, DISTRIBUTION, AND SALE OF PRODUCTS

The Trustee shall use, produce, print, manufacture, and/or reproduce products using Trust Properties, and shall offer such products for sale to the Beneficiary and the general public. The Trustee may enter into appropriate agreements and arrangements with third parties regarding the manufacture, distribution, and sale of products using Trust Properties.

SECTION 7:
TRUSTEE AUTHORITY WITHOUT NOTICE OR PERMISSION

In the absence of the Trustor's specific direction to the contrary, the Trustee may make the following decisions relative to administration of the Trust without prior notice to or permission of the Trustor:

1. The Trustee has complete discretion as to the manufacturing format of products generated from Trust Properties, including appearance, design, typeface, paper grade, binding, cover, ink, or other material.
2. The Trustee has complete discretion in the management of all affairs related to the perpetuation of the Trust's business, including contracts, leases, licenses, covenants, manufacturing specifications, inventory and production quantities, distribution and marketing policies and programs, and pricing of products generated from Trust Properties.
3. The Trustee has the complete discretion to make non-substantive corrections to Trust literary properties as those needs arise. *(see footnote 2, page 10)*
4. The Trustee has the authority to bundle, excerpt, and repackage Trust Properties.[3]
5. The Trustee has complete discretion to create enhanced electronic or digital versions of Trust Properties that include supplemental materials and connections to other fellowship materials. *(see footnote 2, page 10)*

[3] The actual language adopted at WSC 2012 reads:

> To allow the World Board to bundle, excerpt, and repackage Fellowship Approved literature without changes to the texts themselves. The World Board will announce these actions not less than 120 days in advance of publication.

SECTION 8: TRUSTEE OBLIGATION FOR NOTICE AND APPROVAL

Other than alterations that consist of non-substantive corrections, bundling, excerpting, and/or repackaging, or enhanced electronic versions of Trust Properties, the Trustee must notify the Trustor at least ninety days prior to any given ~~biennial World Service Conference~~WSC meeting of the Trustee's intent to publish or otherwise manufacture a product based on an alteration of any Trust Property. The Trustee may not publish or manufacture such a product prior to receiving the Trustor's approval at that ~~biennial~~ meeting. For such a proposal to be approved, two-thirds of the ~~regional~~ delegates recorded as present in the WSC roll call immediately prior to the vote must vote "yes" to the proposal. Where an alteration consists of a non-substantive correction, bundling, excerpting or repackaging, or an enhanced electronic version of Trust Properties, the Trustee shall provide not less than 120 days prior written notice to the Trustor of its intent to publish that product. *(See footnote 2, page 10 and footnote 3, page 13)*

SECTION 9: UTILIZATION OF REVENUES

From the revenues accruing from licenses, covenants, or sale of products generated from Trust Properties, the Trustee shall provide services as directed by the ~~World Service Conference~~WSC, including but not limited to the following:

1. The Trustee shall provide administrative, organizational, and logistical services to the World Service Conference of Narcotics Anonymous and the Fellowship of Narcotics Anonymous at large.
2. The Trustee shall provide service to individual addicts and groups of addicts seeking recovery from addiction, and shall assist the general public in understanding addiction and the Narcotics Anonymous program for recovery from addiction. Such assistance may include direct and indirect communication with addicts, organizations, agencies, governments, and the public at large.
3. The Trustee shall publish and distribute periodicals written or prepared by and/or for the ~~World Service Conference~~WSC.
4. The Trustee shall not utilize revenues generated from Trust Properties to engage in any activities or exercise any powers that are not in furtherance of the primary purpose of Narcotics Anonymous, which is to carry the NA message to the still-suffering addict.

SECTION 10: DISBURSEMENT OF TRUST REVENUE

The Trustee shall hold and manage in a fiduciary capacity the income produced by any of the activities described in Article IV, Sections 6 and 9, of these Rules in such a manner as to further the purpose described in Article I, Section 4, of the Trust Instrument.

SECTION 11: PROTECTION OF TRUST PROPERTIES

The Trustee shall have the duty and authority to protect the Trust Properties from infringement. The Trustee will utilize the following process to proceed with protection of the Trust Properties.

1. Before legal proceedings are initiated, the Trustee will request that all infringing parties cease and desist their infringement.
2. The Trustee will seek to resolve the infringement prior to filing formal litigation.
3. Prior to filing a lawsuit for infringement, at least three-quarters of the ~~board~~ World Board members of Narcotics Anonymous World Services ~~corporation~~, Inc. must approve the action.
4. Prior to filing, the Trustee will report to ~~all World Service Conference participants~~ the Trustor by sending notice to the delegates from WSC-seated regions and zones its intent to file an infringement suit, unless the provision of such a report would demonstrably impair the Trustee's ability to effectively protect Trust Property. In the event that prior notice of intention to protect the intellectual properties of the Trust would jeopardize the success of any action, appropriate provisions or remedies such as injunctions and seizure orders may be sought without prior notice.
5. Once an infringement lawsuit is filed, settlement ~~of infringement litigation~~ shall be at the discretion of the Trustee.

SECTION 12: TRUSTEE REPORTING OBLIGATION

Each year, the Trustee shall give a full written report of its activities to the Trustor. This report shall be delivered to ~~all participants of the World Service Conference~~the Trustor at or before ~~its~~ the ~~biennial~~ meeting of the WSC, and shall be available at cost or less to any Narcotics Anonymous member. This report shall include:

1. A year-end financial report ~~of~~ for ~~the previous~~ each ~~calendar~~ fiscal year.
2. A description of all Trustee activities funded from proceeds generated by the Trust in the ~~previous~~ fiscal year.
3. A budget and project description for Trustee activities planned for the coming conference cycle.

An audit of the Trust for ~~the previous~~each fiscal year will be provided, upon completion, to all ~~participants~~ delegates of the ~~World Service Conference~~WSC as Trustor. This audit shall be performed by an independent ~~-~~certified public accountant. Additionally, the Trustor may elect to instruct the Trustee to perform a review of operational practices and policies, above and beyond the review of internal controls and procedures which is conducted annually.

ARTICLE V: RIGHTS AND RESPONSIBILITIES OF THE BENEFICIARY

SECTION 1: FELLOWSHIP USE OF TRUST PROPERTIES

Use of NA's copyrights, trademarks, and service marks by NA groups, service boards, and committees is covered in a separate document called "Internal Use of NA Intellectual Property."

SECTION 2: BENEFICIARY IMPACT ON THE TRUST

The Beneficiary may take part in decisions affecting the Trust through the established Narcotics Anonymous service structure as described in the most recent Narcotics Anonymous service manual.

SECTION 3: INSPECTION OF TRUSTEE ACTIVITIES

The Fellowship of Narcotics Anonymous, as given voice by its groups through their delegates at the WSC, is the Settlor and the Trustor of the Trust. The Fellowship of Narcotics Anonymous as a whole is the Beneficiary of the Trust. Only the Trustor can request and conduct an inspection of Trustee activities on behalf of the Trust Beneficiary. With the exception of any subject and items excluded by law, there are no limitations on what the Trustor can inspect.

Under Article IV, Section 12 of the Operational Rules, and consistent with California law, Narcotics Anonymous World Services, Inc., as Trustee, is required to, among other things: (1) prepare a year-end financial report for each fiscal year; (2) cause an audit of the Trust activities for each fiscal year to be performed by an independent certified public accountant that includes the revenues and expenses relating to the Trust Properties; and (3) provide a copy of both the financial report and independent audit to all participants of the WSC.

If, after a review of the financial report and independent audit, a member or any component of the NA service structure has questions or concerns, they can contact the World Board. If questions or concerns still remain after contacting the World Board, they would then be discussed through the established Narcotics Anonymous service structure. A request for an inspection can be initiated by any seated region or zone, through its elected delegate, submitting a request by motion to the Trustor, at the World Service Conference, through the *Conference Agenda Report*.

The standard threshold of two-thirds of voting participants at the WSC required to make a decision is changed in this Section 3 to a simple majority (50% plus one).

Conditions of inspection

Any regional service committee or equivalent service body may inspect the records and operations of the Trust on behalf of the Beneficiary, provided the following conditions are met.

1. A motion to conduct an inspection of the Trust must be approved by a regional service committee or its equivalent.
2. The regional service committee wishing to inspect the Trust must assume the expense associated with the participation of its own representative in the inspection. All other costs associated with the inspection shall be borne by the Trustee.
3. The regional service committee must present a written request for inspection of the Trust, detailing its concerns and any particular areas of Trust operations it wishes to inspect.

Selection of inspection team

1. The regional service committee requesting the inspection will select two members of the World Board for inclusion on the inspection team. These two members will facilitate the inspection.
2. The regional service committee requesting the inspection will designate one of its participants to be included on the inspection team.

Inspection limitation

A Trust inspection conducted by a regional service committee on behalf of the Beneficiary may examine any aspect of the Trustee's operations, including all records, with the exception of documents privileged by law, including but not limited to the Trustee's personnel records.

Report of inspection

1. One of the two inspection team members drawn from the World Board will develop a report of the team's findings relative to the region's stated concerns. The report will include full documentation of the inspection team's findings.
2. The final report, along with a copy of the original request for inspection, will then be published in the next *Conference Report*.

ARTICLE VI: REVOCATION AND REASSIGNMENT OF THE TRUSTEE'S RIGHTS AND RESPONSIBILITIES

SECTION 1: CONSIDERATION OF REVOCATION

The Trustee's rights and responsibilities may be revoked and reassigned to another party by the Trustor, provided the following conditions are met:

1. A written petition to revoke the rights and responsibilities of the Trustee must be submitted to the ~~World Service Conference~~WSC. To be considered, the petition must meet one of the following conditions:
   Either the petition must be signed by a third of the ~~regional service committees~~delegates recognized as voting participants in the most recent ~~biennial~~ meeting of the ~~World Service Conference~~WSC,
   Or the petition must be signed by no less than two-thirds of the World Board~~, the motion to submit such a petition having been approved by no less than two-thirds of the members of the World Board.~~
2. In order to be considered at ~~any given~~the next ~~biennial~~ meeting of the ~~World Service Conference~~WSC, such a petition must be received ~~between 1 June and~~by ~~31 December~~1 September of the ~~previous~~ year prior to the next WSC, allowing time for the petition to be distributed to ~~Conference participants~~ the Trustor.
3. If the above criteria are met, the petition will be placed on the agenda of the next ~~biennial~~ meeting of the ~~World Service Conference~~WSC. Statements of the petitioners will be published with the petition itself in the *Conference Agenda Report.*

SECTION 2: REVOCATION PROCESS

1. A two-thirds majority of ~~regional~~ delegates must approve before proceeding with the revocation process.
2. An ad hoc committee will be appointed. The committee will consist of the following:
   a. four ~~regional~~ delegates
   b. the World Board chairperson and three members of the World Board, one of whom will chair the committee
3. This committee will hold two forums during the upcoming conference cycle to receive Fellowship input, and will provide accounts of those forums to ~~conference participants~~the Trustor ~~in the *Conference Report*~~.
4. In addition to those forums, the committee will meet at least twice, and will provide accounts of its meetings to ~~conference participants~~the Trustor ~~in the *Conference Report*~~.

5. At the conclusion of its study, this committee will prepare a written report to be included in the next *Conference Agenda Report,* along with any motions or recommendations related to the proposed revocation.
6. Any motion to revoke the Trustee's rights and responsibilities arising from the committee's study will require approval of two-thirds of the ~~regional~~ delegates recorded as present in the WSC roll call immediately prior to the vote.

SECTION 3: REASSIGNMENT OF TRUSTEE RESPONSIBILITIES

Should the Trustee's rights and responsibilities be revoked, the Trustor will immediately direct the Trustee to assign those rights and responsibilities either to the Trustor or to the entity the Trustor wishes to administer the Trust. The Trustee shall comply immediately with such direction.

ARTICLE VII: REVISION OF TRUST RULES AND INSTRUMENT

SECTION 1: REVISION OF TRUST OPERATIONAL RULES

The Trust Operational Rules may be revised by the "yes" vote of two-thirds of those regional delegates recorded as present in the ~~World Service Conference~~WSC roll call immediately prior to the vote.

SECTION 2: REVISION OF TRUST INSTRUMENT

Provisions of the Trust Instrument may be changed only under the following conditions:

1. Any motion to review proposed revisions to the Trust Instrument must receive the approval of a two-thirds majority of ~~regional~~ delegates at the ~~World Service Conference~~WSC.
2. After such review is approved, proposed revisions will be open for a six-month review and input period, after which the proposed revisions will be presented in the *Conference Agenda Report* for adoption.
3. A motion to adopt any proposed revisions to the Trust Instrument will require a vote of "yes" from two-thirds of those ~~regional~~ delegates recorded as present in the ~~World Service Conference~~WSC roll call immediately prior to the vote.

SCHEDULE A: TWELVE STEPS AND TWELVE TRADITIONS, AS ADAPTED FOR USE BY THE FELLOWSHIP OF NARCOTICS ANONYMOUS

License to adapt the Twelve Steps and Twelve Traditions for use by the Fellowship of Narcotics Anonymous granted by Alcoholics Anonymous World Services, Inc.

Twelve Steps

1. We admitted that we were powerless over our addiction, that our lives had become unmanageable.
2. We came to believe that a Power greater than ourselves could restore us to sanity.
3. We made a decision to turn our will and our lives over to the care of God *as we understood Him.*
4. We made a searching and fearless moral inventory of ourselves.
5. We admitted to God, to ourselves, and to another human being the exact nature of our wrongs.
6. We were entirely ready to have God remove all these defects of character.
7. We humbly asked Him to remove our shortcomings.
8. We made a list of all persons we had harmed, and became willing to make amends to them all.
9. We made direct amends to such people wherever possible, except when to do so would injure them or others.
10. We continued to take personal inventory and when we were wrong promptly admitted it.
11. We sought through prayer and meditation to improve our conscious contact with God *as we understood Him,* praying only for knowledge of His will for us and the power to carry that out.
12. Having had a spiritual awakening as a result of these steps, we tried to carry this message to addicts, and to practice these principles in all our affairs.

Twelve Traditions

1. Our common welfare should come first; personal recovery depends on NA unity.
2. For our group purpose there is but one ultimate authority—a loving God as He may express Himself in our group conscience. Our leaders are but trusted servants; they do not govern.
3. The only requirement for membership is a desire to stop using.
4. Each group should be autonomous except in matters affecting other groups or NA as a whole.
5. Each group has but one primary purpose—to carry the message to the addict who still suffers.
6. An NA group ought never endorse, finance, or lend the NA name to any related facility or outside enterprise, lest problems of money, property, or prestige divert us from our primary purpose.
7. Every NA group ought to be fully self-supporting, declining outside contributions.
8. Narcotics Anonymous should remain forever nonprofessional, but our service centers may employ special workers.
9. NA, as such, ought never be organized; but we may create service boards or committees directly responsible to those they serve.
10. Narcotics Anonymous has no opinion on outside issues; hence the NA name ought never be drawn into public controversy.
11. Our public relations policy is based on attraction rather than promotion; we need always maintain personal anonymity at the level of press, radio, and films.
12. Anonymity is the spiritual foundation of all our traditions, ever reminding us to place principles before personalities.

READER'S NOTES

INTRODUCTION

Who says NA literature is *NA* literature? Who "owns" NA's literature and logos? Who may print and distribute our White Booklet, our Basic Text, our Daily Book, our IPs? What is done with the money paid for NA literature? How is that money accounted for? And what can we do if it's used improperly? The answers to these questions form the substance of the Fellowship Intellectual Property Trust.

The purpose of the Fellowship Intellectual Property Trust is to lay out the collective decisions the Narcotics Anonymous Fellowship has made over the years concerning its literature and logos. Anyone who has any questions about how NA literature is to be developed and approved, who "owns" it, how it may be changed and who may change it, who may print it, and what is to be done with the money resulting from its sale can easily refer to the Fellowship Intellectual Property Trust. In this one comprehensive document appear the policies our entire fellowship has created to preserve the integrity of its published message and the accountability of its publishing services.

These policies have been cast as a legal document, a "trust." This has been done, in part, because US law and international treaty regulate the way "intellectual property"—copyrights, trademarks, and other creations of the mind or spirit—should be administered. The legal "trust" framework has been used because it fits the relationship established in Narcotics Anonymous between the fellowship and its service bodies where NA literature and logos are concerned.

The intent of the trust is to provide assurance to our present and future membership that NA's properties are duly protected from misuse by anyone, including our world services. The trust clarifies and limits Narcotics Anonymous World Services' responsibility and authority in administering those properties on the fellowship's behalf. NA's literature and logos belong to no one individual, board, or committee, but are held in trust for the Fellowship of Narcotics Anonymous as a whole. By casting the policies affecting this arrangement as a registered legal document, we ensure that those policies can be enforced, if need be, by the California state government.

TRUST INSTRUMENT

The first of the Trust document's two parts is the legal "Trust Instrument" which is filed with the California attorney general. The instrument describes the relationship between the NA Fellowship, the fellowship's ~~representatives~~ delegates meeting at the World Service Conference (WSC), and Narcotics Anonymous World Services, Inc. in the manner required in registering a charitable trust in California.

ARTICLE I

What "incidental expenses and costs of... administration" are anticipated?

These are the costs that were originally associated with creating the Trust: normal filing fees incurred in registering the trust instrument, attorney's fees for registration and amplification of applicable copyright and trademark registrations, and other incidental costs.

ARTICLE II: PARTIES TO THE TRUST

This article of the trust instrument briefly identifies the three parties of the Fellowship Intellectual Property Trust according to the relations that have developed over the years in Narcotics Anonymous services. Through their ~~regional~~ delegates, the NA groups make decisions at the ~~World Service Conference~~WSC about the development, approval, and publication of literature on behalf of the entire NA Fellowship. Once those decisions are made, the approved literature is given in trust to Narcotics Anonymous World Services, Inc., which is expected to publish it in accordance with the directions the fellowship's representatives give it. The literature is created and published to benefit the Fellowship of Narcotics Anonymous as a whole in fulfilling its primary purpose: "to carry the message to the addict who still suffers." In legal trust terminology, this makes the NA Fellowship, through ~~its~~ the vote of ~~RDs~~delegates at the WSC, the *Trustor,* Narcotics Anonymous World Services, Inc. the *Trustee,* and the NA Fellowship, as a whole, the *Beneficiary*.

ARTICLE III: IDENTITY OF TRUST PROPERTY

What is meant by "modify or delete property"?

This refers to the fellowship's ability, as trustor, to revise existing NA literature and/or remove an item from the classification of approved NA literature.

What about coffee cups, the Basic Journal, and other such products?

Coffee cups, chips and medallions, desks, chairs, and computers are all physical properties of the NA World Services corporation. However, any trademarks displayed on those properties are specifically subject to the rules of use described in the intellectual property trust.

ARTICLE IV: OPERATIONAL RULES

This article refers to the Trust Operational Rules. Are the rules separate from the Trust in some way? Aren't they registered as part of the Trust with the attorney general?

Because we are talking about "legal stuff," we need to use our terms in a very precise way here. The *Trust* is a legal *arrangement;* it is not any of the documents associated with it. Both the trust *instrument* and the trust *operational rules* are meant to describe how the Trust works—each, however, speaks to a different audience. The trust instrument, describing the basic legal framework of the arrangement, is written to tell the government that we are settling our intellectual property affairs in a particular order recognizable to the courts. The operational rules serve as our fellowship's internal agreement about the details of the trust's actual administration. The trust instrument is like the articles of incorporation of the trust, and the rules are like its bylaws or guidelines. While only the instrument *must* be registered with the attorney general, the rules are also filed for information purposes. Further, Article IV of the instrument links the operational rules to the trust in such a way that, once the instrument is registered, the rules also become legally binding on all parties of the trust.

ARTICLE V: TRUSTEE

In Section 1, Item 6, what is meant by "take, keep control of, and preserve"?

This means that the trustee (NA World Services~~, Inc.~~) has the duty to receive from the fellowship any intellectual properties that the fellowship decides are to be included in the trust. The trustee must then properly register its possession of the property, preserve it in its original form, use it in the way described in the instrument and rules, and take steps to ensure that others do not misuse the intellectual properties.

In Section 1, Item 7, what is meant by "make the trust property productive"?

The trustee must make the trust property available in some useful form to those who would benefit from it—namely, the NA Fellowship as a whole.

In Section 2, what is meant by "all other matters may be delegated"? What are some examples of acts delegated to others?

The trustee may delegate *portions* of its duties—for instance, it may contract with an attorney to register copyrights for certain trust properties—given reasonable supervision by the trustee. However, the trustee may never transfer or delegate to another entity the *whole* of its administrative duties. The trustee may hire an attorney to represent its interests in a court of law; it may charge an employee with the responsibility to account for the income of trust properties; it may appoint someone to negotiate a business deal on its behalf. However, the trustee may *not* ask someone else to take over the role of trustee itself—at least not on its own authority. Only the trustor can reassign all the rights and responsibilities of the trustee to another party (see the rules, Article VI).

Section 3 seems arbitrary. Why has it been included?

This section could really be labeled the trustee's "oath of office," and it is far from arbitrary. The language in this section has been very carefully crafted and is based on extensive California experience in defining the way in which a trustee can effectively be held accountable. Such a statement of the standard of care the trustee is to be held to is required by California trust law.

In Section 4, what are some examples of "powers conferred by statute"?

As with so much of the language included in the trust instrument, the lead to this section is taken directly from the California Probate Code division on trust law, Section 16200. The specifics are drawn from other sections of the code that describe the powers of trustees (Sections 16201, 16202, 16220-21, 16223-49).

In Section 4, can you clarify some of the powers listed?

While the "legalese" language found in these items is sure to be unfamiliar to most of our members, it is very common to these types of legal documents. We will try to clarify the particular points as best we can.

Item 3. *How could "the legal form of business" be changed?* This item is phrased as if the trustee's corporation—Narcotics Anonymous World Services, Inc.—were being set up at the same time as the trust. Item 3 gives ~~NAWS, Inc~~NA World Services. the authority to set up and incorporate a business enterprise so that it can fulfill the rights and responsibilities described in Article IV of the operational rules (print, warehouse, and distribute NA literature, etc.). It also gives ~~NAWS, Inc.~~NA World Services the authority to modify the way in which the business is set up if such is found to be necessary for the fulfillment of its responsibilities as trustee. (For more on "legal forms of business," see the glossary at the back of this handbook.)

Item 4. *What is meant by "manage and control"?* This item gives the trustee (~~NAWS, Inc.~~)NA World Services) the responsibility to properly register, protect, and regulate the use and licensing of the trust properties themselves—that is, the copyrights to NA literature and the registrations of our trademarks and service marks. It also gives the trustee the authority to put whatever proceeds or assets might come from the sale of literature (using trust copyrights) or NA memorabilia (using trust trademarks) to whatever uses would most benefit the NA Fellowship.

Item 5. *How, to whom, and why would property be "encumbered, mortgaged, or pledged"?* This is one of the standard clauses in trust instruments. It is usually intended to indicate that the trustee has been granted full authority to manage the trust property, especially for purposes of interaction with financial institutions. This power is very similar to a homeowner's ability to secure a mortgage on the equity in his or her house. It simply means that the trustee could use trust property as collateral in securing a loan, if that were held to be in the best interests of the trust. Note, however, that the most important of the trust properties—our fellowship's name and logos and the copyrights to NA's literature—*cannot* be put up for a loan.

Item 8. *Borrow money from whom? Why does this not say anything about excluding outside enterprises or being self-supporting?* Item 8 allows the trustee to borrow money in the name of the trust and to use the proceeds from sales of literature (using trust copyrights) or memorabilia (using trust trademarks) to repay the loan without allowing a claim to be made on the trust properties (the copyrights and trademarks) themselves. Most businesses avail themselves of credit-line services offered by financial institutions. It is the belief of the World Board that this service is not an "outside *contribution*" since NA ~~WS, Inc.~~World Services not only repays the principal but also makes interest payments for its use.

Item 9. This item simply authorizes the trustee to settle any legal actions taken against the trust should the trust itself be sued, and to release others from claims arising from disputes initiated by the trustee if such is deemed to be in the best interests of the trust.

Item 11. *Does this include writers? What does "administrative duties" mean?* This item allows the trustee to hire or contract with people specifically to manage affairs related to the trust arrangement itself. Such administrative duties might require the assistance of attorneys to register copyrights and trademarks, accountants to keep track of the proceeds from the sale of literature and memorabilia, or administrative staff to compile necessary reports on trust activities, process trust-related correspondence, or evaluate requests to reprint literature protected by trust copyrights. Editorial staff could be used to draft or edit reports for these purposes, of course, but this item does not give the trustee specific authority to hire writers to help with the drafting or editing of literary projects being developed by ~~one or another of the WSC boards or committees (now~~ the World Board~~)~~. The authority to spend money generated from the sale of copyrighted literature or memorabilia using trust trademarks to hire staff to provide "administrative, organizational, and logistical services to the ~~World Service Conference~~WSC" (writers among them, should they be required) is detailed in Article IV, Section 9, Item 1 of the Operational Rules.

Item 12. This item gives the trustee the authority to sign whatever legal documents it must sign in the course of carrying out its responsibilities.

Item 13. This item gives the trustee the authority to defend itself if it is sued and to file its own lawsuits against others, not only to protect the trust property but also to protect the trustee from liability, so long as its actions have been taken within the framework of its duties. Note that the matter of filing suit to protect the fellowship's literature and logos is dealt with in much greater detail in Article IV, Section 11 of the operational rules.

What is the purpose of Section 5? Would it mean that new groups would not be able to get starter kits from NA World Services? Would it mean they couldn't get literature if they couldn't afford it?

Under California trust law, the power to make loans to the beneficiary is one of the standard powers assigned to trustees. Therefore, we must specifically limit this power in our trust's instrument if we do not wish monetary loans to be made from the trust.

This section does not limit the kinds of group service efforts we have come to expect from NA World Services. It does not prevent NA World Services from providing new groups with starter kits, and it does not restrict NA World Services from making appropriate arrangements to distribute literature at reduced cost or free of charge in cases of need. (See Article IV, Section 9 of the Trust Operational Rules, and specifically Item 2.)

In Section 6, define "indemnify." Is there any insurance policy? A different policy for the World Board? What are some examples of "other persons"? Define "wrongfully consented to"; give possible examples.

To indemnify means "to secure against hurt, loss, or damage." All this section does is provide that none of the persons mentioned will be burned at the stake for making a simple error in judgment made while carrying out their duties, provided the error is made in good faith. The "other persons" referred to could include either those who are contracted to provide specific services for NA World S~~, Inc.~~ervices or who provide services on a voluntary basis at the behest of the corporation. If any of them are sued for something they've done in the performance of their duties, Article V, Section 6 of the trust instrument requires the trustor to protect them from personal harm.

Early in 1992, NA~~WS, Inc.~~ World Services extended its liability insurance coverage to provide this specific kind of protection for members of the World Board (including its officers), other volunteers on world service business, WSO employees, and those under specific contract to NA~~WS, Inc.~~ World Services. A single policy covers them all. Authorization for such insurance has been specified since 1987 in Article 8 of ~~NAWS, Inc.~~NA World Services bylaws.

Note that this section does *not* protect board members, officers, employees, or anyone else from any liability that may arise from wanton neglect of their responsibilities or from malicious acts. Nor does this section provide for protection against liability arising from "any act wrongfully consented to by the beneficiary or trustor."

Why can an individual be sued by the trustee (NA ~~WS, Inc.)~~World Services) while an individual associated with the trustee cannot be sued for their actions? Why does the trustee have more rights and protection than the beneficiary?

It's true that both the trust instrument and the operational rules have provisions allowing the trustee to file lawsuits to protect both itself and NA's literature and logos. (See instrument, Article V, Section 4, Item 13, and rules, Article IV, Section 11.) To date, the

fellowship has stated in no unclear terms that NA~~WS, Inc.~~ World Services is responsible to protect the fellowship's literature and logos from anyone who threatens them, whoever those persons may be. This is simply a restatement of the intent of our First and Fourth Traditions in the context of the entire fellowship's intellectual property rights: No individual NA member, no individual NA group has the right to take action benefiting themselves that would impair our common welfare or negatively impact NA as a whole in any serious way. If the fellowship were to forbid the trustee to protect NA's copyrighted literature from being altered or published at will by individual members or groups, the courts would interpret that as the fellowship's way of saying that they had abandoned their collective control of the copyrights to NA literature—to put it bluntly, we would lose our copyrights to the Basic Text and all other NA literature.

Let's clarify the matter of lawsuits and the indemnification provided to NA ~~WS~~ World Services members, employees, and contractors. Indemnification simply provides assurance that those who serve on our World Board or who take employment at ~~NAWS~~ NA World Services will not be subject to personal financial ruin if they are sued for doing their jobs. They are given this kind of protection because it is conceivable that people put in such a position on our behalf may need it and because our fellowship has refused to put them in that position without backing them up. This does not give them more rights than the beneficiary. Remember, the beneficiary is "the Fellowship of Narcotics Anonymous *as a whole."* In the normal course of trust activities, NA as a whole is not exposed to any liability at all; only the trustee is exposed to such liability. The only reason the beneficiary, as defined in this trust, is not provided indemnification from liability is because the beneficiary *has* no liability associated with the trust.

Why is Section 7 there?

Organizations taking part in political activities are regulated by the tax authorities in a different way than nonpartisan organizations. Therefore, any public benefit or charitable organization applying for tax exemption must include such a provision in its organizing instrument.

ARTICLE VII: TERMINATION

Under what circumstances could "the trust purpose [be] fulfilled"?

This is a standard provision in the articles of incorporation or bylaws of many nonprofit organizations. The trust purpose may be fulfilled either when addiction disappears or when a cure is found—granted, not a likely occurrence. On the other hand, it could conceivably come to be impossible for the trust purpose to be fulfilled if, for instance, legislation is enacted outlawing the association of known addicts.

ARTICLE VIII: JURISDICTION

Why California and not some other USA state?

Because the standards of accountability that trustees are held to in caring for a trust are far stricter in California than anywhere else in the USA. Registering the Fellowship Intellectual Property Trust in California provides the fellowship with the greatest

possible protection. NA~~WS corporation~~ World Services has had principle offices and has been registered in the State of California since 1977. The California Attorney General's Office would probably have had some serious questions if we had tried to establish this trust in a state with more lenient standards of care.

Why no jury trial?

Because trusts are subject to probate law, not criminal law, and juries are not used in probate court. This is merely a statement of legal fact concerning all trusts under California law, not a special provision of the Fellowship Intellectual Property Trust.

ARTICLE IX: TRUST REGISTRATION

When the trust was approved, the ~~RDs~~ delegates who voted on the groups' behalf to do so selected one of their members to sign the instrument for them before it was filed with the California attorney general as shown on page 5. The same will have to be done in the future if the instrument is ever revised.

TRUST OPERATIONAL RULES

The next section of the trust document is the working "operational rules," the bylaws or guidelines ~~which~~ that control the actual administration of the trust and the relationship between the parties to the trust: the fellowship, its representatives, and Narcotics Anonymous World Services.

ARTICLE I

Section 1

Section 1 provides a brief documentary history of the trust relationship that had already developed between the fellowship, the World Service Office, the World Service Board of Trustees, and the World Service Conference prior to the formal creation of the Fellowship Intellectual Property Trust.

Section 2

Section 2 summarizes the general purpose of the Trust Operational Rules.

Section 3

Section 3 briefly defines and describes the three parties to the Fellowship Intellectual Property Trust: the *Trustor,* the *Trustee,* and the *Beneficiary*. In all trusts, the *trustor* establishes the general policies that guide the administration of the trust property. The *trustee* carries out the trustor's instructions in the day-to-day management of the property of the trust. And the *beneficiary* is the person or group of people in whose interest the trust is managed. In this trust, the trustor is the Fellowship of NA as given voice by its groups through their ~~RDs~~ delegates at the ~~World Service Conference~~WSC,

the trustee is Narcotics Anonymous World Services, Inc., and the beneficiary is the NA Fellowship as a whole. It is our belief that these trust roles line up pretty closely with the roles the ~~RDs~~delegates, NA World Services, and the fellowship have already come to play in NA's development. With the exception of our narrowed definition of the trustor as the body of ~~RDs~~delegates, we have not described anything new in the Fellowship Intellectual Property Trust; we have merely tried to mirror the existing service relationships in our fellowship.

The means by which the fellowship acts as trustor is described in a very specific, even peculiar way. What is behind this language?

In developing the trust, we had originally identified the ~~World Service Conference~~WSC itself as the trustor. Historically, the NA groups have given the conference authority to make decisions concerning services affecting the entire fellowship, putting it in a good position to act as trustor of the Fellowship Intellectual Property Trust. However, identifying the WSC itself as trustor created two problems.

First, because the trustor must be the actual owner of whatever is being placed into trust, we would have to find a way to identify the fellowship itself as the trustor and, hence, the "equitable" (or moral) owner of NA's literature and logos.

Second, with the approval of *Twelve Concepts for NA Service* in 1992, our fellowship had agreed that decisions affecting the NA message must be decided, in some fashion, by the NA groups. For example, the essay on Concept Two reads, "proposals to change NA's Twelve Steps, Twelve Traditions, name, nature, or purpose should be approved directly by the groups." The NA name, being a registered trademark and service mark, is one of the intellectual properties covered by this trust; the nature and purpose of Narcotics Anonymous are defined by its copyrighted literature, also protected under the Trust. Giving the whole WSC body authority to make decisions about the Fellowship Intellectual Property Trust seemed to run contrary to the spirit of the Twelve Concepts. Somehow, the Trust would have to identify either the NA groups or their direct representatives as the collective trustor.

However, we could not show the duties of the trustor of the Fellowship Intellectual Property Trust as being dissipated among the individual groups because the decisions the trustor has to make affect the fellowship as a whole. To give individual groups the ability to take action on their own that could seriously affect other groups or NA as a whole would contradict our Fourth Tradition. Somehow, we had to provide means by which the groups or their direct representatives could fulfill their responsibilities as trustor in a coordinated way, so that they all took part in decisions affecting them all.

That's how we came to define the trustor as:

1. the Fellowship of Narcotics Anonymous
2. as given voice by its groups
3. through their ~~regional~~ delegates
4. at the World Service Conference.

The fellowship itself, as given voice by its groups through their ~~regional~~ delegates at the World Service Conference, ~~chosen~~elected by regions and zones seated at the

WSC, is identified as the Trustor and, therefore, the equitable owner of NA's literature and logos. The NA groups are placed in direct control of the trust because the trust directly affects the interests of each individual NA group. Only their direct representatives, the ~~RDs~~delegates, are recognized as having the ability to make decisions on their behalf concerning the Trust. The ~~RDs~~ delegates are required to make those decisions only within the context of the WSC, assuring that action affecting the entire fellowship will be conducted in a coordinated fashion.

ARTICLE II

The first four sections of this article simply describe the items that have been placed in trust: NA's Twelve Steps and Traditions, other NA literature, NA's name and marks, and the copyrights to NA literature. The Trust document regulates the creation, revision, and use of these items in a way consistent with already-approved policy.

Ownership

Throughout Article II, we find statements like this: "The ownership of [our literature] will be registered in the name of the Trustee," Narcotics Anonymous World Services, Inc. Some members might ask, "Does this mean that the fellowship doesn't own its own literature?" The answer to that question is *no.*

Ever since the World Service Office (now called Narcotics Anonymous World Services, Inc.) was created in the early 1970s, it has been the registered *legal* owner of the copyrights to our literature. However, the *equitable* owner of our literature is the fellowship itself, as described in Article I, Section 3 of these rules. Narcotics Anonymous World Services, Inc. is not, after all, a completely independent entity; it is our fellowship's world service corporation. All Article II says is that legal ownership of the fellowship's literature will be registered in the name of the fellowship's legal corporation.

Regarding Section 3, does this include coffee cups, the Basic Journal, and other memorabilia products?

Trademarks and service marks, described in Section 3, are included among the trust properties. Use of these marks on coffee cups, the Basic Journal, or other memorabilia are subject to regulation by the Trustee.

Regarding Section 3, define "hybrid"

Hybrids of the NA logos are fairly common—for instance, the stylized NA initials with the "NA Tree" superimposed.

Does Section 4 affect H&I's "*Reaching Out*" newsletter?

Reaching Out, specifically, is not currently copyrighted because the conference has not given any instructions to restrict its duplication.

Section 5: works made for hire

Section 5 offers a very specific definition of the terms under which NA literature is created and copyrighted. We believe this definition is consistent with precedence, already-established fellowship policy, and our fellowship's philosophy of both the anonymity and the accountability of its trusted servants. When our trusted servants take part in an NA service project, we expect them to do so not to accrue power, property, or prestige to themselves but to unselfishly serve our fellowship. And we expect that our fellowship, through its representatives in the service structure, will have final authority over such projects from start to finish.

Does this mean that no literature will be originated outside the World Board? Is an individual, group, area, or region prohibited from writing literature?

No, to both questions. First, note that this section refers to *all* the world service boards and committees~~, not just the conference literature committee~~. Material originated in an individual's home, for instance, or in a group, area, or region would only need to be accompanied by a copyright release before it could be incorporated into the NA literature development process, as has always been the case.

Does this mean that no individual who may have a vast knowledge in a particular area of recovery and/or the fellowship may have his or her name printed?

Though we do not print NA books or pamphlets showing the names of individual authors, that is not what this section refers to. This says that individuals who take any part, big or little, in helping create literature for NA must do so for the fellowship's benefit, not their own. The copyrights will be registered in the trustee's name, protecting the entire fellowship's rights to the literature, *not* in the names of any individuals who may have had a part in the project. Creative members who wish to write and publish their own copyrighted recovery material under their own names are not prohibited from doing so, provided they do not use the NA name or other trademarks.

If the trustor has constant control over literature from commencement to conclusion, does that include area or regional newsletters?

No. This refers only to *trust* literary properties—materials created in the name of NA as a whole. For more information on local newsletters, see the approved *Handbook for NA Newsletters,* available from the World Service Office.

ARTICLE III

In this article, the role of the fellowship in the creation, approval, and revision of NA literature is clearly described: The fellowship, as given voice by its groups through their ~~RDs~~ delegates at the WSC, currently has sole authority to approve or revise NA literature. Primary among the "agents" referred to in Section 1 is the World Service Conference and the ~~boards and committees~~World Board through which it does its detail work.

Does the way Section 1 is written exclude the creation of literature, etc., outside of the WSC/NA ~~WS~~World Services—for instance, in groups or areas?

No. This says only that the conference has sole authority with regard to literature created "for and on behalf of the NA Fellowship," referring to the *entire* fellowship.

Does this leave anything out (keytags, world convention cups, etc.)?

No. What's being regulated is not the products (keytags, cups) themselves, but the NA trademarks and service marks used in *making* those products—*all* those products, no matter who their manufacturer may be.

Why is Section 2 included in the rules?

To clarify the relationship of the ~~World Service Conference~~WSC, our fellowship's general decision-making body, with its boards and committees, to the trustor. While the trustor—the ~~RDs~~ delegates at the ~~World Service Conference~~WSC—has direct authority in matters relating to the intellectual property trust, the trustor has a standing relationship with the World Board which facilitates the actual work involved in developing new material and revising existing materials within the terms of the trust.

It sounds like the Basic Text and other pieces of NA recovery literature may be revised with only one hundred fifty days notice. Is this true?

Yes, technically speaking. This reflects conference action. However, the same action showed an understanding that the fellowship should be given as much time as possible to review new or revised literature being proposed for its approval.

ARTICLE IV

This article of the operational rules goes into great detail in describing the role, responsibilities, and limitations that have been placed on Narcotics Anonymous World Services, Inc. in administering the fellowship's literature and logos.

Section 3: What is fiduciary relationship?

Section 3 defines the "fiduciary" relationship between the trustor (the body of fellowship delegates) and the trustee (NA ~~WS~~World Services). Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property, and may take it back if he or she pleases. This is the fiduciary relationship, and it matches well the arrangements that have been made in past years for the management and protection of NA-approved literature copyrights and logos by Narcotics Anonymous World Services, Inc.

Does Section 4 conflict with the Trust Instrument, Article V, Section 4, Item 11?

No, this section does not conflict with the trustee's authority to hire people, granted in the instrument; it says specifically "that this provision shall *not* prevent payment to any such person of reasonable compensation for services rendered to or for the trustee in furtherance of its purposes."

What are some examples of expenses?

Members of the World Board of ~~NAWS~~ NA World Services are routinely compensated for their expenses associated with travel to and from board meetings—airfare, meals, and lodging. Another common expense is for phone calls used to conduct ~~NAWS~~ NA World Services board business.

Does this mean non-addict authors for hire? Are more specific guidelines needed?

While there is nothing in this section forbidding the hiring of non-addict authors by ~~NAWS~~NA World Services, WSC guidelines prohibit their use in the development of NA literature (Sec. 3-G). That seems to be sufficiently specific for our purposes.

Regarding Section 7, does Item 1 mean logos can be changed at any time?

If what you mean by "logos" is the Narcotics Anonymous name, the design of the stylized NA initials, the diamond in a circle, or the original NA group logo, the answer is *no.* Changes in those trademarks and service marks can only be made by the fellowship itself as given voice by its groups through their ~~RDs~~ delegates at the conference.

Does Item 2 mean the trustee totally controls pricing of all literature?

Yes—that is, Narcotics Anonymous World Services, Inc. controls the prices at which ~~NAWS~~ NA World Services sells materials to others. This has been standard policy since the office's creation.

Section 11: How does the trustee protect the trust property?

This section describes the process to be used in protecting the trust's intellectual properties. It allows Narcotics Anonymous World Services, Inc. to respond in a timely manner to infringement of the trust's copyright, trademark, and service mark registrations, and to inform the fellowship of the problem. It also gives the office the authority to settle the problem in the best interests of the fellowship, provided that the members of the World Board concur. The provisions of Section 11 are consistent with a motion regarding infringement action approved at WSC'91.

Regarding Section 11, Item 5, does this mean that NA~~WS, Inc.~~ World Services can file a lawsuit without telling (or asking) the WSC if it thinks that it may jeopardize the success of that action?

Yes. As we were putting the trust documents together, the only situation in which we imagined this occurring would be if one or more ~~conference participants~~delegates

themselves were targets of a particular suit. Note also that the item says that prior notice cannot be withheld unless it "would *demonstrably* impair the trustee's ability to effectively protect the trust property." Should the ~~RDs~~delegates, as trustor, ever suspect that notice had been withheld without due cause, they could—and should—require NA World Services to demonstrate its case.

Section 12: What is the trustee reporting obligation?

This section lays out the fellowship's requirements for full annual reports from Narcotics Anonymous World Services on its finances and operations, especially as they relate to the fellowship's literature. This section is included to ensure that ~~NAWS~~NA World Services, as trustee, remains fully accountable for the way in which it administers our intellectual property trust.

ARTICLE V

This article describes the role of the beneficiary, the NA Fellowship as a whole, in the trust. One section deserves particular attention: Section 3.

Section 3

This section describes how a member or any component of the NA service structure can make a request if it has concerns about the financial activities associated with the Fellowship Intellectual Property Trust. It describes some of the ways that financial assurance is provided through reporting and independent audits. It then describes a process to use if the seated region or zone has concerns after reviewing the information available. The first step is to contact the World Board. If the concern is still unresolved, the final step is to ask the fellowship to support an inspection through a motion in the Conference Agenda Report. Only the WSC can make the decision to initiate an inspection request, as they speak for the beneficiary and are responsible for the allocation of NA World Service's resources. The standard threshold of two-thirds of voting participants at the WSC required to make a decision would be changed in this case to a simple majority (50% plus one).

~~goes far beyond the legal requirements normally imposed on trusts. Normally, the beneficiary of a trust is not permitted to examine the trustee's records under any circumstances. Such an arrangement, however, would not be appropriate in Narcotics Anonymous, especially in light of our Ninth Tradition and Second Concept. Therefore, we have drafted Section 3 in such a way as to allow segments of the fellowship to review the records of Narcotics Anonymous World Services, Inc. Any region may inspect any NAWS records except its personnel records. (USA federal employment codes require that employers keep these records completely confidential.) The inspection team would be led by a member of the World Board who is intended to serve as mediator and controller of the inspection. The reporting coming out of the inspection is designed to be objective, and its results are to be distributed to all RDs. This inspection procedure can do two things:~~

~~1. It can defuse controversy by thoroughly and objectively investigating any suspicion of impropriety on the part of NAWS in its administration of the trust.~~

~~2. It allows for open communication, thereby removing any air of suspicion or doubt.~~

Does there need to be a specific "concern" to justify an inspection?

~~Item 3 under "Conditions of Inspection" requires the RSC that requests the inspection to "detail its concerns and any particular areas of trust operations it wishes to inspect."~~Given the resources that are already used to provide assurance of the financial activities and reporting for NA World Services, any concern should be articulated in a way that clearly outlines the issue and what the region or zone believes should be inspected. ~~This provision facilitates easy inspection of particular aspects of trust operations, should only limited areas be of concern.~~

ARTICLE VI

This article provides for a two-stage approach to the revocation and reassignment of trustee rights and responsibilities. The plan is based on the fact that revocation of the trustee's responsibilities would be a major organizational move. Such a move should take place only if there is widespread, serious concern about the trustee's ability to fulfill its responsibilities, and only after thorough review.

Section 1

The first stage of the revocation process describes the means by which it will be determined whether there is substantial concern about the trust's administration. If so, the ~~RDs~~ delegates must then approve *consideration* of a revocation proposal by a majority.

Sections 2, 3

The second stage of the revocation process describes the *actual* consideration, revocation, and reassignment. This stage takes a conference cycle to complete, allowing time for discussion and fellowship input. The committee created to study the revocation proposal is composed of a cross-section of ~~World Service Conference~~WSC participants, with a member of the World Board chairing the committee. The decision to revoke the trustee's rights and responsibilities requires approval of two-thirds of the ~~RDs~~delegates, ensuring substantial consensus on so weighty a decision.

ARTICLE VII

This article is a simple process for revision of the Trust Operational Rules and, more significantly, of the Trust Instrument itself. Revision of the Operational Rules can be accomplished on the spot. Revision of the Trust Instrument, however, takes longer. This is to assure that adequate consideration is given such a change.

What happens to the trust when and if the service structure changes?

Article VII of the Trust Operational Rules describes clear procedures by which both the instrument and the rules can be revised to conform with any change in the service structure.

GLOSSARY

A

Arbitration. Specific means by which civil disputes may be settled out of court; in California, regulated by civil code. (Instrument, Article V, Section 4, Item 9)

B

Bond. A deposit guaranteeing performance of an act previously agreed to, which is forfeited if the act is not fulfilled according to terms. (Instrument, Article I, Section 5)

C

Conveyance. The transference of property (esp. real property) from one person to another by any lawful act; in modern use only by deed or writing between living persons. (Instrument, Article I, Section 2)

Copyrights. The exclusive right given by law... to an author, composer, designer, etc. (or his assignee) to print, publish, and sell copies of his original work.

E

Encumber. To burden (a person or an estate) with debts; *esp.* to charge (an estate) with a mortgage. (Instrument, Article V, Section 4, Item 5; and Article V, Section 5)

F

Fiduciary. A *fiduciary relationship* is "one founded on trust or confidence reposed by one person in the integrity and fidelity of another." Basically, the fiduciary relationship is one where someone is given something to care for—copyrights, for example—and specific instructions about how to provide that care. Further instructions on how that care should be given may be issued as time goes on, and the caretaker is obliged to follow those instructions. Though the thing being cared for may come to be *legally* registered as the property of the caretaker, the original owner (in our case, the fellowship) maintains what is called *equitable interest* in the property and may take it back. (Instrument, Article V, Section 4; Operational Rules, Article I, Section 1; and Article IV, Sections 2, 3, and 10)

H

Hybrid trademarks, service marks. The combination of one registered trademark or service mark with one or more other marks, whether registered or not. (Operational Rules, Article II, Section 3; Article IV, Section 5)

I

Indemnification. To secure against hurt, loss, or damage (esp. by means of an insurance policy). (Instrument, Article V, Section 6)

Infringement. A breaking or breach *(of* a law, obligation, right, copyright, patent, etc.); breach, violation. (Operational Rules, Article I, Section 1; Article IV, Section 11)

Injunction. A judicial process by which one who is threatening to invade or has invaded the legal or equitable rights of another is restrained from commencing or continuing such wrongful act, or is commanded to restore matters to the position in which they stood previously to his action. (Operational Rules, Article IV, Section 11, Item 5)

Intellectual property. Creations of the mind or spirit. Types of intellectual property include literature, trademarks, patents, and manufacturing processes, among others.

L

Legal form of business. The organizational type under which a business is registered with the government. Such forms include corporations, foundations, partnerships, and unincorporated associations of individuals. (Instrument, Article V, Section 4, Item 3)

P

Pecuniary profit. An award resulting from a lawsuit. (Operational Rules, Article IV, Section 3)

Performance audit. A meticulous examination of management policies and procedures. (Operational Rules, Article IV, Sections 10 and 12)

*Detail***:** A normal *audit* occurs when a CPA comes into the office, reviews the accounts, prepares the annual financial statements, and certifies the integrity of the books with specific notes. This kind of audit is currently conducted each year at ~~NAWS~~NA World Services, and its results are published in ~~NA World Services~~the Annual Report.

A *performance audit* is more complicated, more time-consuming, and vastly more expensive. The accountants come in, review NA ~~WS~~ World Services financial policies, then track through every aspect of everything ~~NAWS~~ NA World Services does that has to do with either incurring expense, paying out money, or receiving payment. Once they've completed their job, they issue a comprehensive report and set of recommendations on ~~NAWS~~ NA World Services financial procedures along with the ordinary statements and certification. No performance audit has yet been conducted of ~~NAWS~~NA World Services.

Perpetual charitable trust. *Perpetual* means "never ceasing; continuous; enduring; lasting; unlimited in respect of time." A *charitable trust* is defined as a "fiduciary relationship with respect to property arising as a result of a manifestation of an intention to create it, and subjecting the person by whom the property is held to equitable duties to deal with the property for a charitable purpose." A *charitable purpose* is thought of as the "accomplishment of objectives which are beneficial to the community or area." And a *fiduciary relationship* is "one founded on trust or confidence reposed by one person in the integrity and fidelity of another." (Instrument, Article I, Section 3)

Probate Code, California. The branch of California civil code governing trusts. (Instrument, Article VIII)

Prudence. Ability to discern the most suitable, politic, or profitable course of action, esp. as regards conduct; practical wisdom, discretion. Wisdom; knowledge of or skill in a matter. Foresight; providence. *Note that in the course of California Probate Court action, "prudence" as affecting the administration of trusts has come to describe certain specific standards of care.* (Instrument, Article V, Sections 3 and 4)

R

Ratify. To confirm or make valid (an act, compact, promise, etc.) by giving consent, approval, or formal sanction (esp. to what has been done or arranged for by another). (Operational Rules, Article I, Section 1; Article IV, Section 11, Item 4)

Recovery literature. Any Narcotics Anonymous book, booklet, or pamphlet intended primarily for use by individual NA members or for use or distribution within the context of an NA recovery meeting. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Register. To make formal entry of (a document, fact, name, etc.) in a particular register; also to get (a document, etc.) entered in the register by the person entitled to do so. (Instrument, Article IX; Operational Rules, Article I, Section 3; Article II, Section 5; Article IV, Section 5)

S

Seizure orders. Court orders to seize a person's property to remedy prior damage to another or to prevent the possibility of further damage. (Operational Rules, Article IV, Section 11, Item 5)

Service marks. A mark or device used to identify a service offered (such as transportation or insurance).

Service materials. Handbooks or other materials intended primarily for use within the context of an NA service board or committee. (Instrument, Article III, and Operational Rules, Article II, Section 2)

Settlor. The dictionary defines *settlor* as "a person who makes a settlement of property." When the trust instrument says that "the Fellowship of Narcotics Anonymous... is the Settlor and Trustor," it means that the fellowship is the creator of both the property being placed in trust and the trust itself, and therefore maintains equitable ownership of the trust property. (Instrument, Article II)

T

Third-party liability. A liability in the nature of a contingent claim, wherein the trustee is not accused of having caused damages and does not claim to have been harmed but is rather held liable for someone else's damages. (Instrument, Article V, Section 4, Item 7)

Trademark. A mark secured by legal registration used by a manufacturer or trader to distinguish his goods from similar wares of other firms; usually a distinctive device or figure, a fancy name or trade name, or the name of an individual or firm, marked or impressed on the article or upon the package, etc., in or with which it is sold.

Addendum C

Intellectual Property Bulletin #1

Clean Copy of Proposed Revision

NA Intellectual Property Bulletin #1
2023 *Conference Agenda Report* proposed revisions

Internal Use of NA Intellectual Property

The NA Fellowship's policy on the reproduction and use of copyrighted NA Fellowship-approved recovery literature and the use of registered NA trademarks by NA groups, service boards, and committees.

The Fellowship Intellectual Property Trust (*FIPT*) describes in detail how NA's name, trademarks, and recovery literature are protected and administered by Narcotics Anonymous World Services, Inc. (NA World Services). At the request of the Fellowship, as given voice by its groups through their regional delegates at the 1993 World Service Conference, and for the benefit of the Fellowship as a whole (who is the Beneficiary of this Trust), the *FIPT* was created, and NA World Services was formally appointed the Trustee of the Fellowship's intellectual properties, and confirmed to be the sole publisher and distributor of all NA recovery literature. NA World Services is directly accountable to the World Service Conference and, as trustee, holds legal title to all NA trademarks and recovery literature. This bulletin and other Intellectual Property Bulletins are presented as an adjunct to the *FIPT* and contain the policies related to the accepted use of NA's intellectual properties within the Fellowship, without having to request specific permission from NA World Services. These policies are based partly on legal considerations and partly on the nature of NA. These policies help ensure that NA's name, trademarks, and recovery literature will always be available to fulfill our primary purpose. Any use of NA's name, trademarks, recovery literature, or other intellectual property that is not specifically covered here is reserved to Narcotics Anonymous World Services, Inc.

Our fiduciary duty

As trustee, NA World Service has been entrusted with the responsibility to obtain, maintain, and enforce copyright and trademark protection for NA's name, trademarks, and recovery literature on behalf of the Fellowship. Because no one person or group of people owns Fellowship-approved literature, copyright ownership is registered in the name of Narcotics Anonymous World Services, Inc. This ensures, among other things, that the Fellowship's message as presented in our recovery books and pamphlets is not changed, used, or sold by others, and the Fellowship's trademarks are not used in an inappropriate way. This is first and foremost about the integrity of the NA message and the need to protect NA's intellectual property so that NA can continue to own and control its own material. NA World Services has also been delegated the responsibility to ensure that Narcotics Anonymous literature being distributed contains the current text agreed upon by the Fellowship of Narcotics Anonymous. Protecting our copyrights and trademarks is an essential way to guarantee the conceptual fidelity of the NA message, NA literature, and to safeguard the property of the NA Fellowship.

In order to maintain copyright control, NA recovery material can only be reproduced with permission of NA World Services, the copyright holder. All recovery material has a Fellowship–approved logo described later in this document. This bulletin attempts to outline that permission within Narcotics Anonymous. You can find additional information about these efforts at www.na.org/fipt.

Making our Message Available

NA World Services goes to great lengths to ensure access to the NA message. Fellowship-approved recovery pamphlets, meeting readings, and booklets are posted on www.na.org in over fifty languages. Fellowship websites that wish to provide access to this material should include a link to these pieces, rather than copying or posting this material themselves. NA World Services does not currently post book-length pieces of NA literature online because of our previous experience with the widespread proliferation of PDF versions. The practical inability to control widespread distribution of electronically produced materials weakens the Fellowship's ability to protect its copyrighted material. We fulfill this need by NA World Services distributing thousands of printed books and other recovery literature to addicts in need each year.

Most of NA World Services' income comes from proceeds on the sales of printed literature, and it currently gives away or subsidizes more than a half million dollars' worth of literature each year. The money members do or don't spend on literature affects NA World Services' ability to respond to requests for literature from addicts across the globe. We are not a normal business; we are a spiritual Fellowship that has to manage a business, and that is NA World Services. However, in order to fulfill our mission—to work toward a future where "every addict in the world has a chance to experience the message in his or her own language and culture"—NA World Services needs to remain financially stable and able to reproduce, register, and protect the intellectual property of Narcotics Anonymous.

Policy for Use & Reproduction of NA Recovery Literature by Groups and Service Bodies

Use by individual NA members or others

Policies, in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to use NA copyrighted recovery literature, or other intellectual property. Individual NA members or others who wish to use any part of NA's copyrighted recovery literature should write directly to Narcotics Anonymous World Services, Inc.

Use by NA groups

As a general rule, no one has the authority to reproduce NA Fellowship-approved recovery literature without prior written permission from NA World Services. However, given the nature of our Fellowship, our experience indicates that NA groups *and only NA groups* should have the authority to reproduce current Fellowship-approved recovery literature pamphlets and booklets, so long as they consider the Fourth Tradition and the limitations described here. A description of the NA group—its nature, function, and role in the NA Fellowship—can be found in the *Group Booklet*. This permission does not apply to any Fellowship-approved book-length pieces. A book-length piece is defined as over 25,000 words in English.

When considering the need to reproduce NA Fellowship-approved recovery literature, NA groups should consider the spiritual principles of responsibility, unity, and autonomy as referenced in our Fourth Tradition, and follow all of these general policies:

1. An NA group can only reproduce current booklets and pamphlets of NA Fellowship-approved recovery literature when it has a clear *need* to do so.
2. NA Fellowship-approved recovery literature reproduced by an NA group can only be distributed within that group and never distributed online or in an electronic format. Such materials should always be given away free of charge; they cannot be sold to generate income.
3. The text of NA Fellowship-approved booklets and pamphlets reproduced by an NA group cannot be altered or modified in any way.

4. The copyright for the item being reproduced should be shown prominently as follows: "Copyright © *[year of first publication]*, Narcotics Anonymous World Services, Inc. Reprinted by permission. All rights reserved."

Use by registered NA service bodies

NA service bodies that are registered with Narcotics Anonymous World Services, Inc. may quote or reproduce portions of NA Fellowship-approved recovery literature, up to 25% of the original piece. In the case of NA book-length literature, registered NA service bodies may reproduce or quote up to 25% of a single chapter; daily meditation entries are considered a chapter. If you have questions or want approval to exceed these limits, please contact Narcotics Anonymous World Services, Inc.

For locally developed resources, we ask that the piece clearly state what it is and what service body approved it. In order to avoid confusion, the formatting should not resemble NA recovery literature. Translations of NA recovery literature often involve local reproduction during the local approval process. Approvals for this purpose can be obtained by contacting Narcotics Anonymous World Services, Inc.

NA service bodies that are registered with Narcotics Anonymous World Services, Inc. that wish to quote or reproduce portions of NA Fellowship-approved recovery literature should always include the proper notation or credit identifying the origin of the quote or portion.

Policy for Use of NA Trademarks by Groups and Service Bodies

Use by individual NA members or others

Policies in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to reproduce or use NA trademarks or other intellectual property. Individual NA members or others who wish to use NA's trademarks should write directly to Narcotics Anonymous World Services, Inc.

Use by NA groups and service bodies

The policies below outline how all NA groups and also service bodies that are registered with Narcotics Anonymous World Services, Inc. may use NA's trademarks.

Some of the NA Fellowship's registered trademarks are: the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, and the original NA group logo, all shown below. NA World Services also has additional registered trademarks that are reserved for use by NA World Services.

Narcotics Anonymous®

Policies for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. The Narcotics Anonymous name or trademarks should not be used by an NA group or service body in any way that would imply affiliation, legal liability, or financial responsibility by or to another part of the Fellowship, service structure, or outside enterprise. That means that we should not use the Fellowship's trademarks, name, or logos:

- in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise;
- in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials;
- in a manner as to possibly offend or disrespect the sensibilities of other organizations, groups, or NA as a whole; or

- in any manner that could draw us into public controversy.

"NA Fellowship Approved" trademark

The "NA Fellowship Approved" trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their delegates at the World Service Conference. Literature with this trademark is typically the only type of literature read in NA meetings. The "NA Fellowship Approved" trademark is only used by Narcotics Anonymous World Services, Inc. and may not be used by any NA group, service body, or any others, on any other materials.

Marking trademarks

The symbol ® should be placed to the right of all registered NA trademarks every time any of them are reproduced or used, whenever possible. By doing so, we are showing that these trademarks are legally owned or registered. This is one way in which we help preserve the Fellowship's legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group or service body has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the Fellowship can later be used to benefit a private individual or an outside business enterprise.

NA Intellectual Property Bulletin #1 was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference on 27 April 1993, applicable as of 1 May 1993. It was amended at the World Service Conference in 1997 and 1998. This bulletin supersedes all previous Bulletins and policies pertaining to the use of copyrighted literature and registered trademarks by NA groups, service boards, and committees.

This is the document identified by name in the Fellowship Intellectual Property Trust Operating Rules, Article V, Section 1. It was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference as Trustor of the Fellowship Intellectual Property Trust on 27 April 1993, and revised by the regional delegates at the World Service Conference on 30 April 1997 and 27 April 1998. It may be changed only by the Trustor.

To register, or for more information, contact NA World Services,
PO Box 9999, Van Nuys, CA 91409 USA, Tel: (818) 773-9999, Website: www.na.org.

Addendum D

Intellectual Property Bulletin #1

with Recommended Changes Tracked

Key:

~~Recommended deletion~~

Recommended addition

~~Text moved~~

Text moved

NA Intellectual Property Bulletin #1

~~revised July 2010~~

2023~~0~~ *Conference Agenda Report* proposed revisions

Internal Use of NA Intellectual Property

~~A statement of the~~The NA Fellowship's policy on the ~~reprinting~~reproduction and use of copyrighted NA Fellowship-approved recovery literature and the use of registered NA trademarks ~~and service marks~~ by NA groups, service boards, and committees.

~~—~~The Fellowship Intellectual Property Trust (*FIPT*) describes in detail how NA's name, trademarks, and recovery literature are protected and administered by Narcotics Anonymous World Services, Inc. (~~NAWS). It covers NA's name,~~NA World Services). At the request of the Fellowship, as given voice by its groups through their regional delegates at the 1993 World Service Conference, and for the benefit of the Fellowship as a whole (who is the Beneficiary of this Trust), the *FIPT* was created, and NA World Services was formally appointed the Trustee of the Fellowship's intellectual properties, and confirmed to be the sole publisher and distributor of all NA recovery literature. NA World Services is directly accountable to the World Service Conference and, as trustee, holds legal title to all NA trademarks and recovery literature ~~in all forms, including translations, and all mediums, whether printed, electronic and any other media that may be developed in the future. Additional guidelines, contained in this and the~~. This bulletin and other Intellectual Property Bulletins~~, for the use of NA's intellectual properties by the fellowship~~ are presented as an adjunct to the *FIPT*~~. The guidelines~~ and contain the policies related to the accepted use of NA's intellectual properties within the Fellowship, without having to request specific permission from NA World Services. These policies are based partly on legal considerations and partly on the nature of NA. ~~By following~~creating ~~t~~These ~~simple steps~~policies~~, the fellowship will help~~Fellowship ~~help~~s ensure that NA's name, trademarks, and recovery literature will always be available to fulfill our primary purpose. Any use of NA's name, trademarks, recovery literature, or other intellectual property that is not specifically covered here is reserved to Narcotics Anonymous World Services, Inc.

~~All matters not specifically addressed by the Intellectual Property Bulletins will be considered under the conditions of the Fellowship Intellectual Property Trust. Any questions or concerns about the Bulletins should be directed to NA's World Service Office.~~

~~This Bulletin reflects the policy affecting the use of NA intellectual property within the NA Fellowship. Use of the fellowships trademarks and recovery literature is a commitment to comply with these Guidelines. Usage inconsistent with the Guidelines is improper. Usage disputes are dealt with in Intellectual Property Bulletin #5.~~

~~**Use by NA groups**~~

~~These Guidelines outline the appropriate uses of NA logos and recovery literature by NA groups. The Guidelines also lay out criteria a group can use to avoid improper use. A description of the NA group its nature, function, and role in the NA Fellowship can be found in current NA service manuals. You are encouraged to review those sections describing groups prior to attempting use of the Guidelines described below.~~

~~**Use by NA service boards and committees**~~

~~Service boards and committees created directly or indirectly by NA groups may use NA logos and recovery literature in the ways described in these Guidelines so long as they register with NA World Services.~~

Our fiduciary duty

As trustee, NA World Service has been entrusted with the responsibility to obtain, maintain, and enforce copyright and trademark protection for NA's name, trademarks, and recovery literature on behalf of the Fellowship. Because no one person or group of people owns Fellowship-approved literature, copyright ownership is registered in the name of Narcotics Anonymous World Services, Inc. This ensures, among other things, that the Fellowship's message as presented in our recovery books and pamphlets is not changed, used, or sold by others, and the Fellowship's trademarks are not used in an inappropriate way. This is first and foremost about the integrity of the NA message and the need to protect NA's intellectual property so that NA can continue to own and control its own material. NA World Services has also been delegated the responsibility to ensure that Narcotics Anonymous literature being distributed contains the current text agreed upon by the Fellowship of Narcotics Anonymous. Protecting our copyrights and trademarks is an essential way to guarantee the conceptual fidelity of the NA message, ~~–~~NA literature, and to safeguard the property of the NA Fellowship.

In order to maintain copyright control, NA recovery material can only be reproduced with permission of NA World Services, the copyright holder. All recovery material has a Fellowship–approved logo described later in this document. This bulletin attempts to outline that permission within Narcotics Anonymous. You can find additional information about these efforts at www.na.org/fipt.

Making our Message Available

NA World Services goes to great lengths to ensure access to the NA message. Fellowship-approved recovery pamphlets, meeting readings, and booklets are posted on www.na.org in over fifty languages. Fellowship websites that wish to provide access to this material should include a link to these pieces, rather than copying or posting this material themselves. NA World Services does not currently post book-length pieces of NA literature online because of our previous experience with the widespread proliferation of PDF versions. The practical inability to control widespread distribution of electronically produced materials weakens the Fellowship's ability to protect its copyrighted material. We fulfill this need by NA World Services distributing thousands of printed books and other recovery literature to addicts in need each year.

Most of NA World Services' income comes from proceeds on the sales of printed literature, and it currently gives away or subsidizes more than a half million dollars' worth of literature each year. The money members do or don't spend on literature affects NA World Services' ability to respond to requests for literature from addicts across the globe. We are not a normal business; we are a spiritual Fellowship that has to manage a business, and that is NA World Services. However, in order to fulfill our mission—to work toward a future where "every addict in the world has a chance to experience the message in his or her own language and culture"—NA World Services needs to remain financially stable and able to reproduce, register, and protect the intellectual property of Narcotics Anonymous.

Policy for Use & Reproduction of NA Recovery Literature by Groups and Service Bodies

Use by individual NA members or others

~~Guidelines~~Policies, in this or other Intellectual Property Bulletins, do not grant individual NA members or those outside NA permission to use NA ~~trademarks, copyrighted recovery literature,~~ or other intellectual property. Individual NA members or others who wish to use any part of NA's ~~trademarks or~~ copyrighted recovery literature should write directly to ~~NA~~Narcotics Anonymous World Services, Inc.

Guidelines for Use of NA Trademarks

Some of the NA Fellowship's registered trademarks are: the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, and the original NA group logo, all shown below:

Narcotics Anonymous®

Guidelines for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. The Narcotics Anonymous name or trademarks should not be used by an NA group, service board or committee in any way that would imply legal liability or financial responsibility by or to another part of the fellowship, service structure, or outside enterprise.

Narcotics Anonymous trademarks should not be used in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise.

Narcotics Anonymous trademarks should not be used in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials.

Narcotics Anonymous trademarks should not be used or displayed in such a manner as to possibly offend or disrespect the sensibilities of other organizations, groups or NA as a whole.

- Narcotics Anonymous trademarks should not be used in any manner that could draw us into public controversy.

Narcotics Anonymous trademarks should not be used on locally developed recovery literature.

"NA Fellowship Approved" trademark

The "NA Fellowship Approved" trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional delegates at the World Service Conference. The "NA Fellowship Approved" trademark may not be used on any other materials.

FELLOWSHIP NA APPROVED

Marking trademarks

Either the capital letter "R" or a "TM" should be placed inside a small circle to the right of all NA trademarks every time any of them are used. By doing so, we are showing that these logos are legally owned or registered trademarks. This is one way in which we help preserve the fellowship's legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group, service board, or committee has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the fellowship can later be used to benefit a private individual or an outside business enterprise.

~~GUIDELINES FOR REPRODUCTION OF NA RECOVERY LITERATURE~~

~~NA World Services acts as the publisher of all NA Fellowship-approved recovery literature. As such, it has been entrusted with the responsibility to obtain copyright protection for these items on behalf of the fellowship. This ensures that the fellowship's message as presented in our books and pamphlets is not tampered with.~~

~~Narcotics Anonymous World Services is largely dependent on the income generated from the sale of NA recovery literature. This income is used to cover the costs of publishing as well as the expenses associated with other services provided to the World Service Conference and the NA Fellowship at large. A large part of NA World Service's income comes from NA groups who purchase recovery literature to distribute at their meetings. Many groups consider their purchase of NA Fellowship-approved recovery literature as one way in which they contribute to the unity and growth of NA as a whole.~~

Use by NA groups

As a general rule, no one has the authority to reproduce NA Fellowship-approved recovery literature without prior written permission from ~~Narcotics Anonymous~~NA World Services. However, given the nature of our ~~fellowship~~Fellowship, our experience indicates that NA groups *and only NA groups* should have the authority to reproduce ~~fellowship-approved recovery literature in certain instances. When preparing to reproduce NA~~ current Fellowship-approved recovery literature~~, NA groups should discuss~~ pamphlets and booklets, so long as they consider the Fourth Tradition and ~~follow all~~the limitations described here. A description of ~~these general guidelines:~~the NA group—its nature, function, and role in the NA Fellowship—can be found in the *Group Booklet*. This permission does not apply to any Fellowship-approved book-length pieces. A book-length piece is defined as over 25,000 words in English.

When considering the need to reproduce NA Fellowship-approved recovery literature, NA groups should consider the spiritual principles of responsibility, unity, and autonomy as referenced in our Fourth Tradition, and follow all of these general policies:

1. An NA group ~~should~~can only reproduce current booklets and pamphlets of NA Fellowship-approved recovery literature when it has a clear *need* to do so.
2. NA Fellowship-approved recovery literature reproduced by an NA group ~~should~~can only be distributed ~~only~~ within that group~~.~~ and never distributed online or in an electronic format. Such materials should always be given away free of charge; they ~~should never~~cannot be sold to generate income.
3. The text of NA Fellowship-approved ~~books~~booklets and pamphlets reproduced by an NA group ~~should not~~cannot be altered or modified in any way.
4. The copyright for the item being reproduced should be shown prominently as follows: "Copyright © *[year of first publication]*, Narcotics Anonymous World Services, Inc. Reprinted by permission. All rights reserved."

Use by registered NA service ~~boards and committees~~bodies

~~Registered NA service boards and committees who wish to quote or reprint portions of NA Fellowship~~ NA service bodies that are registered with Narcotics Anonymous World Services, Inc. may quote or reproduce portions of NA Fellowship-approved recovery literature, up to 25% of the original piece. In the case of NA book-length literature, registered NA service bodies may reproduce or quote up to 25% of a single chapter; daily meditation entries are considered a chapter. If you have questions or want approval to exceed these limits, please contact Narcotics Anonymous World Services, Inc.

For locally developed resources, we ask that the piece clearly state what it is and what service body approved it. In order to avoid confusion, the formatting should not resemble NA recovery literature. Translations of NA recovery literature often involve local reproduction during the local approval process. Approvals for this purpose can be obtained by contacting Narcotics Anonymous World Services, Inc.

NA service bodies that are registered with Narcotics Anonymous World Services, Inc. that wish to quote or reproduce portions of NA Fellowship-approved recovery literature should always include the proper notation or credit identifying the origin of the quote or portion. ~~reprinted portion they wish to use. Generally speaking, the length of a reprint or quote should not exceed 25% of the original piece. In the case of NA books, reprints or quotes should not exceed 25% of a single chapter or section. In the case of an article from *The NA Way Magazine*, the entire piece may be used if the source is fully cited. Any use of NA's name, trademarks or recovery literature that is not specifically covered is reserved to NAWS, Inc~~.

POLICY FOR USE OF NA TRADEMARKS BY GROUPS AND SERVICE BODIES

Use by individual NA members or others

Policies in ~~the~~ this or other Intellectual Property Bulletins ~~does not create any other right or claim by the user~~, do not grant individual NA members or those outside NA permission to reproduce or use NA trademarks or other intellectual property. Individual NA members or others who wish to ~~any~~use NA's trademarks should write directly to Narcotics Anonymous World Services, Inc.

Use by NA groups and service bodies

The policies below outline how all NA groups and also service bodies that are registered with Narcotics Anonymous World Services, Inc. may use NA's trademarks.

Some of the NA Fellowship's registered trademarks are: the name "Narcotics Anonymous," the stylized NA initials, the diamond in a circle, and the original NA group logo, ~~and the PR "stamp" logo,~~ all shown below. NA World Services also has additional registered trademarks that are reserved for use by NA World Services.

Narcotics Anonymous®

Policies for Use

Use of Narcotics Anonymous trademarks should always reflect the seriousness of our primary purpose and our spiritual foundation of anonymity. ~~fellowships marks under~~The Narcotics Anonymous name or trademarks should not be used by an NA group or service body in any way that would imply affiliation, legal liability, or financial responsibility by or to another part of the Fellowship, service structure, or outside enterprise. That means that we should not use the Fellowship's trademarks, name, or logos:

- in any way that would serve to endorse, finance, promote, or affiliate the NA Fellowship with any outside enterprise;
- in conjunction with any law enforcement, political, medical, or religious slogans, themes, or other related materials;
- in ~~such~~ a manner as to possibly offend or disrespect the sensibilities of other organizations, groups, or NA as a whole; or
- in any manner that could draw us into public controversy.

"NA Fellowship Approved" trademark

The "NA Fellowship Approved" trademark is used to indicate that a piece of recovery literature has been approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their delegates at the World Service Conference. Literature with this trademark is typically the only type of literature read in NA meetings. The "NA Fellowship Approved" trademark is only used by Narcotics Anonymous World Services, Inc. and may not be used by any NA group, service body, or any others, on any other materials.

Marking trademarks

The symbol ® should be placed to the right of all registered NA trademarks every time any of them are reproduced or used, whenever possible. By doing so, we are showing that these trademarks are legally owned or registered. This is one way in which we help preserve the Fellowship's legal right to ownership of its trademarks.

Protecting artwork

Whenever an NA group or service body has an artist create original artwork, drawings, designs, or screens using any NA trademark, the NA body should always be sure the artist signs a document releasing to the NA body his or her rights to the artwork, including the original rendering. By doing so, we ensure that neither the NA logos nor any artwork that has been created for the benefit of the Fellowship can later be used to benefit a private individual or an outside business enterprise.

This is the document identified by name in the Fellowship Intellectual Property Trust Operating Rules, Article V, Section 1. It was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference as Trustor of the Fellowship Intellectual Property Trust on 27 April 1993, and revised by the regional delegates at the World Service Conference on 30 April 1997 and 27 April 1998. It may be changed only by the Trustor.

NA Intellectual Property Bulletin #1 was approved by the Fellowship of Narcotics Anonymous as given voice by its groups through their regional service representatives at the World Service Conference on 27 April 1993, applicable as of 1 May 1993. It was amended at the World Service Conference in 1997 and 1998. This bulletin supersedes ~~supercedes~~ all previous Bulletins and policies pertaining to the use of copyrighted literature and registered trademarks ~~and service marks~~ by NA groups, service boards, and committees.

To register, or for more information, contact NA World Services,
PO Box 9999, Van Nuys, CA 91409 USA, Tel: (818) 773-9999, Website: www.na.org.

Addendum E

List of Published Materials

Showing Categories and Translations

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Languages Published as of 16 November 2022
Basic Text	X			1983/2008	37	AF, AR, BG, BM, BR, CH, CR, DK, EN, FA, FI, GE, HE, HI, HU, ID, IS, IT, JP, LT, NL, NR, PB, PL, PO, SP, SW, TU, FR, GR, TH, LV, RU, FL, NE, KN, SH
Just For Today	X			1992/2008	16	EN, SW, SP, RU, PO, NR, LT, JP, IT, HI, HE, GE, FR, FA, DK, PB
It Works, How and Why	X			1993	20	EN, SW, SP, PO, PL, NR, JP, IT, HI, HE, GE, FR, FI, FA, DK, PB, AR, LT, HU, RU
Introductory Guide to NA	X			1992	23	EN, HU, PB, CR, DK, FA, FL, FI, FR, AR, GR, TU, IT, LT, NL, NR, PL, SP, SW, GE, AF, ID, RU
White Booklet	X			1976/1983	28	EN, JP, AN, ASL, BE, PB, FA, FL, FR, GE, GR, AF, IT, KO, LT, MT, NR, PO, RU, SL, SP, SW, TU, HI, IS, KA, KN, TA
The Group Booklet	X			1990/2000	15	EN, SP, RU, PO, PL, NR, LT, IT, HU, HE, GE, FR, FA, DK, PB
12 Concepts for NA Service	X			1992	16	EN, SW, SP, RU, PO, PL, NR, LT, IT, HU, GE, FR, FA, PB, GR, JP
Miracles Happen		CA		1998/2002	4	EN, FA, PB, SP
Behind the Walls	X			1990	16	EN, SW, SP, RU, PO, PL, NR, LT, JP, IT, HU, GE, FA, PB, SL, FR
In Times of Illness	X			1992/2010	13	EN, SP, PO, NR, IT, HE, GE, FR, FA, DK, RU, PB, SW
Working Step Four in NA	X			1988	18	EN, SP, RU, PO, PL, NR, MP, LT, IT, HU, GE, FR, FI, FA, DK, PB, SW, TU
The Narcotics Anonymous Step Working Guides	X			1998	20	EN, IT, PB, DK, FA, FI, FR, HE, AR, HU, SW, JP, LT, NR, PL, PO, RU, SP, HI, LV
Sponsorship	X			2004	9	EN, SP, RU, NR, IT, GE, FR, FA, PB
Living Clean	X			2012	11	EN, SW, SP, RU, NR, IT, FA, PL, HU, GR, PB
Guiding Principles	X			2016	3	EN, FA, SP
60th Anniversary White Book	X			2021	1	EN
A Spiritual Principle a Day	X			2022	1	EN
IP #1 Who, What, How, and Why	X			1976/1986	57	EN, FI, LV, KN, JP, IT, ID, IS, HU, HI, HE, GR, AF, FR, MT, FL, FA, ET, DK, CR, CH, BG, PB, BE, AR, AN, GE, SP, OR, SR, CS, CT, KO, AM, UR, UA, TU, TH, TA, LT, SH, BM, SL, SK, RU, PA, PO, PL, NR, NE, NL, MP, ZU, SW, BN, KA, ASL
IP #2 The Group (IP)	X			1976/1998	30	EN, MP, PB, CR, DK, FA, FL, FI, FR, GE, HE, ID, AF, LT, KO, NL, NR, PL, PO, RU, SL, SP, SW, TH, UA, IT, ZU, AR, TU, TA
IP #5 Another Look	X			1985/1992	38	EN, FA, HU, HI, GR, GE, FR, AF, FL, JP, DK, CR, CH, PB, AN, AR, FI, PO, KO, UA, TU, TH, SW, SP, ID, RU, IT, PL, NR, NL, LT, LV, CT, SL, IS, KA, NE, TA
IP #6 Recovery & Relapse	X			1976/1986	45	EN, AN, FL, AR, HU, HI, HE, GR, GE, IT, FI, JP, FA, DK, CR, CH, BG, PB, BE, FR, RU, CT, KO, UA, TU, TH, SW, ID, SL, ZU, PO, PL, NE, NL, NR, MP, LT, SP, BM, KN, TA, IS, AF, KA, LV
IP #7 Am I an Addict?	X			1983/1988	51	EN, FL, JP, IT, ID, IS, HU, HI, HE, GR, GE, AF, FI, LT, FA, ET, AN, DK, CR, CH, BG, PB, BE, AR, FR, SL, OR, CT, KO, UR, UA, TU, TH, TA, SW, KN, SP, LV, SK, RU, PO, PL, NR, NE, NL, MP, BM, ZU, SH, BN, KA
IP #8 Just For Today (IP)	X			1983	43	EN, FA, ID, IS, HU, HI, GR, GE, FR, AN, FL, LV, DK, CR, CH, BG, PB, BE, AR, FI, PO, KO, UA, TU, TH, SW, SH, SP, IT, RU, JP, PL, NR, NE, NL, MP, BM, LT, CT, SL, TA, AF. KA
IP #9 Living the Program	X			1983	32	EN, KN, AN, BE, PB, DK, FA, FI, FR, GE, HE, HI, HU, AF, IT, TU, LT, MP, NL, NE, NR, PL, PO, RU, SP, SW, TH, IS, AR, ZU, TA, BN

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Languages Published as of 16 November 2022
IP #11 Sponsorship	X			1983/2004	41	EN, FA, HU, HI, HE, GR, GE, FR, AF, FL, JP, ET, DK, CR, CH, PB, AR, AN, FI, PL, KO, UA, TU, TH, SW, SP, SL, ID, PO, IT, NR, NE, NL, MP, LT, LV, CT, RU, TA, IS, BM
IP #12 Triangle of Self-Obsession	X			1983	32	EN, IT, AN, AR, PB, BG, DK, FA, FI, FR, GE, HE, AF, HU, TH, LV, LT, MP, NL, NR, PL, PO, RU, SK, SP, SW, HI, TU, ID, KA, NE, TA
IP #13 By Young Addicts for Young Addicts	X			2008	25	EN, LT, PB, DK, FA, FI, FR, GE, HE, HU, AN, IT, KO, NL, NR, PL, PO, RU, SP, SW, TH, TU, IS, AR, TA
IP #14 One Addict's Experience...	X			1983/1992	38	EN, FL, AN, IS, HU, GR, GE, IT, FI, JP, FA, DK, CR, CH, PB, AR, FR, PO, KO, UA, TU, TH, SW, ID, RU, CT, PL, NR, NL, MP, LT, LV, SP, SL, AF, BM, NE, TA
IP #15 PI and the NA Member	X			1991	25	EN, MP, BE, PB, DK, FA, FR, GE, HU, IS, AN, LT, TH, NL, NE, NR, PL, PO, RU, SP, SW, IT, TU, AF, TA
IP #16 For the Newcomer	X			1983	46	EN, FL, AN, ID, IS, HU, HI, HE, GR, GE, JP, FI, KN, FA, ET, DK, CR, CH, PB, BE, AR, FR, PO, CT, KO, UA, TU, TH, SW, SH, SP, IT, RU, ZU, PL, NR, NE, NL, MP, BM, LT, LV, SL, TA, AF, KA
IP #17 For those in Treatment	X			1991	17	EN, SW, SP, RU, PO, PL, NR, LT, IT, ID, HU, GE, FA, DK, PB, FR, NE
IP #19 Self Acceptance	X			1985	43	EN, FL, AN, HU, HI, HE, GR, GE, IT, FI, JP, FA, DK, CR, CH, BG, PB, AR, FR, PO, KO, UA, TU, SW, SH, SP, ID, RU, CT, PL, NR, NE, NL, MP, LT, LV, SL, IS, AF, BM, BN, KA, TA
IP #20 H&I and the NA Member	X			1986/2001	22	EN, LT, PB, DK, FA, FR, GE, HU, IS, AN, LV, SW, MP, NL, NE, NR, PL, RU, SP, IT, AF, TA
IP #21 The Loner	X			1986	14	EN, SW, SP, RU, PO, PL, NR, IT, HU, GE, FI, FA, PB, BM
IP #22 Welcome to NA	X			1986/1987	44	EN, FA, AF, IS, HU, HI, HE, GR, GE, FR, IT, FL, JP, DK, CR, CH, BG, PB, BE, AR, AN, FI, PO, CT, KO, UA, TU, TH, SW, SH, SP, ID, RU, ZU, PL, NR, NE, NL, MP, BM, LT, LV, SL, TA
IP #23 Staying Clean on the Outside	X			1987/1988	38	EN, FL, HU, HI, GR, GE, AN, FI, LV, FA, DK, CR, CH, PB, AR, FR, PO, KO, UA, TU, TH, SW, SP, IT, RU, JP, PL, NR, NL, BM, LT, CT, SL, ID, IS, AF, NE, TA
IP# 24 Money Matters: Self Support in NA	X			2010	22	EN, IT, AN, AR, PB, DK, FA, FI, FR, GE, HU, SW, LT, MP, NL, NR, PL, PO, RU, SP, HE, LT
IP #26 Accessibility for Those with Additional Needs	X			1998	13	EN, SP, RU, NR, IT, GE, FA, DK, PB, FI, FR, HU, SW
IP #27 For Parents or Guardians of Young People in NA	X			2008	17	EN, TU, SP, RU, PL, NR, NL, IT, HU, GE, FR, FA, DK, PB, PO, FI, TA
IP# 28 Funding NA Services		CA#		2010	19	EN, TU, SP, RU, PO, PL, NR, NE, NL, IT, GE, FR, FA, DK, PB, AR, AF, HU, SW
IP#29 An Introduction to NA Meetings	X		SP in 2008	2014	21	EN, TU, SP, RU, PO, PL, NR, IT, HE, DK, CH, PB, AR, AF, JP, FA, TH, FI, FR, HU, SW
IP #30 Mental Health in Recovery	X			2020	10	EN, DK, FA, FI, FR, HU, ID, PB, SP, SW
Public Relations Material						
NA: A Resource in Your Community*		CA		1991/2016	16	EN, TU, SW, SP, RU, PO, PL, NR, LT, IT, FR, FA, BG, PB, FI, TA
Narcotics Anonymous and Persons Receiving Medication Assisted Treatment			X	2016	8	EN, DK, SP, SW, FA, NR, IT, RU
Membership Survey*+			X	2006/2019	11	EN, SW, SP, PL, IT, ID, HU, GE, FR, PB, FA
Information about NA*+			X	2006/2019	19	EN, CT, SW, SP, NR, IT, ID, HU, GR, GE, FR, CH, AR, FA, PB, PL, SL, FI, RU
European Membership Survey*+			X	2010/2019	1	EN
Russian Membership Survey*+			X	2019	1	RU

Item	Fellowship Approved Recovery Material	Conference Approved	WB Approval and CP Review	Date of First Publication & Last Revision Date	Number of Languages	Languages Published as of 16 November 2022
Service Tools						
Hospitals & Institutions Handbook		CA#		1987/1989	2	EN, FA
Guide to World Services in NA		CA#		2000/2018	2	EN, SP
A Guide to Local Services in NA		CA#		1997	4	EN, GE, SP, FA
Public Relations Handbook		CA#		2006	3	EN, SP (DRAFT), FA
Literature Committee Handbook		CA#		1983/1987	1	EN
Handbook for NA Newsletters		CA#		1985	1	EN
A Guide to Phoneline Service		CA#		1986	2	EN, FA
Treasurer's Handbook		CA#		1985/2003	3	EN, IT, SP (DRAFT)
Group Treasurer's Workbook		CA#		1988, 2003	3	EN, LT, SP
Outreach Resource Information		CA#		1998	1	EN
Institutional Group Guide		CA#		1998	2	EN, PB
Additional Needs Resource Information		CA#		1998	1	EN
Group Business Meetings, SP			X	2007	16	EN, SW, SP, PO, PL, NR, IT, HE, FR, FA, FI, RU, AR, HU, PB, TU
Group Trusted Servants: Roles and Responsibilities, SP			X	2007	14	EN, SW, SP, RU, PO, NR, LT, IT, FR, FI, FA, PB, AR, HU
Disruptive and Violent Behavior, SP			X	2007	20	EN, IT, PB, FA, FI, FR, GE, AR, HE, SW, LT, NR, PL, PO, RU, SP, GR, DK, HU, TU
NA Groups and Medication, SP			X	2007	16	EN, SW, SP, PO, NR, IT, HU, HE, GR, GE, FR, FI, FA, DK, RU, PL
Principles and Leadership in NA Service, SP			X	2008	9	EN, SP, NR, IT, GE, FA, PL, RU, FR
Social Media and Our Guiding Principles, SP			X	2011	14	EN, SP, RU, PO, NR, IT, GE, FR, FI, DK, FA, PL, PB, HU
PR Basics			X	2010	5	EN, GE, SP, PB, FA
H&I Basics			X	2010	4	EN, GE, SP, PB
Translations Basics			X	1999/2018	2	EN, SP
Phoneline Basics			X	2018	3	EN, SP, FA
Planning Basics			X	2011	3	EN, SP, FA
Local Service Toolbox • CBDM Basics • Serving NA in Rural & Isolated Communities • GSR Basics • Virtual Meeting Basics			X	 2018 2019 2020 2022	 6 2 3 2	 EN, NR, FA, IT, PL, SP EN, SP EN, SP, FA EN, SP
Conventions & Events Toolbox • The Program Committee and Developing the Program • Money Management • Contracts and Negotiations			X	 2018 2019 2020	 2 2 2	 EN, SP EN, SP EN, SP

* Statistics and local information for these items can be amended with notification to NAWS. These items are routinely updated with WB approval and without CP review.
+ Items approved with only WB approval
# Indicates "adaptable" for local needs in translations

Code	Language
AF	Afrikans
AM	Amharic
AN	Anglicized
AR	Arabic
ASL	American Sign Language
BE	Bengali
BG	Bulgarian
BM	Bahasa Melayu
BN	Bengali/Bangladesh
BR	Braille
CH	Chinese
CR	Croation
CS	Czech
CT	Chinese Traditional
DK	Danish
EN	English
ET	Estonian
FA	Farsi
FI	Finnish
FL	Filipino
FR	French
GE	German
GR	Greek
HE	Hebrew
HI	Hindi
HU	Hungarian
ID	Indonesian
IS	Icelandic
IT	Italian
JP	Japanese
KA	Georgian
KN	Kannada
KO	Korean
LT	Lithuanian
LV	Latvian
MP	Manipuri
MT	Maltese
NE	Nepali
NL	Nederlands
NR	Norwegian
OR	Odia
PA	Punjabi
PB	Portuguese/Brazil
PL	Polish
PO	Portuguese
RU	Russian
SH	Swahili
SK	Slovak
SL	Slovenian
SP	Spanish
SR	Serbian
SW	Swedish
TA	Tamil
TH	Thai
TU	Turkish
UA	Ukrainian
UR	Urdu
ZU	Zulu