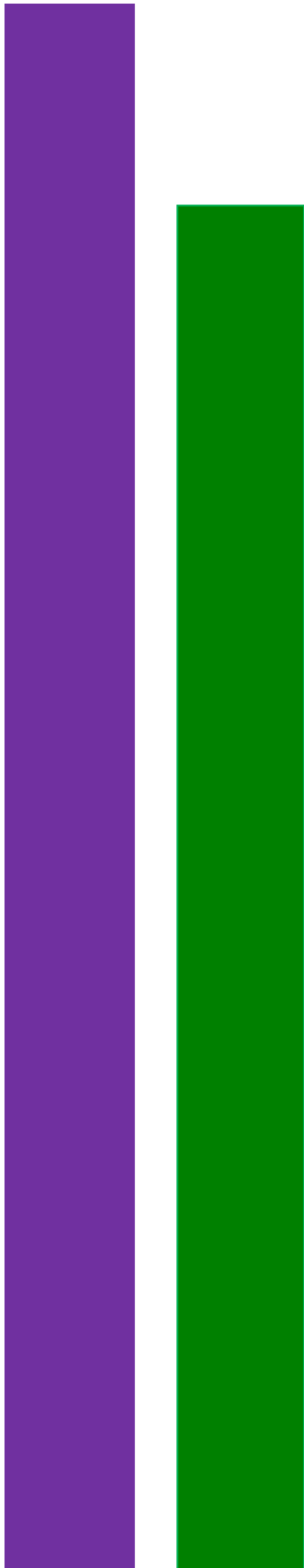


# Debtors Anonymous

5-Year Plan

2009-2014



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## **INTRODUCTION**

In 2006, the DA World Service Conference requested that the General Service Board (GSB) prepare a Five-Year Plan 2009-2014 “that shall include but not be limited to a vision for the DA Fellowship, a mission statement, goals, objectives, capability analysis, trend analysis, action plan and prosperity spending plan.”

The process of preparing a comprehensive Five-Year Plan has proved a major undertaking for a Board, three members shy of its full complement of needed Trustees, who were at the same time successfully completing the search for a writer for the DA *Twelve Steps and Twelve Traditions* book.

While the World Service Conference (WSC) of Debtors Anonymous has, since the first Conference in 1987, provided yearly reports to the Fellowship, until recently there has been neither the personnel nor the finances to allow for a systematic collection of relevant statistical information.

The General Service Board has compiled this Five-Year Plan with information gathered from 20 years of World Service Conference Reports, 10 years of verifiable financial records, sales records obtained from both the publishers of the *Currency of Hope* and the Debtors Anonymous pamphlets, plus literature inventories conducted by the staff of the General Service Office (GSO).

In some instances, in the absences of collected statistical information, this analysis relies upon anecdotal observations from present and former Trustees.

## **A VISION FOR THE FELLOWSHIP OF DEBTORS ANONYMOUS**

In the *Visions* pamphlet we state, “In Debtors Anonymous vision may be thought of as the ability to form a clear and specific picture of what we want to do in life, what we want to obtain, create achieve or accomplish. It's knowing where we are going. Our vision is our mission, our dream, and our goals — as they have been revealed to us by our Higher Power.” The clear and specific picture of what we as a Fellowship want to achieve is well stated in our primary purpose of carrying the message to the compulsive debtor who still suffers. Indeed, the very survival of our Fellowship rests on our ability to carry that Step Twelve message of hope. As we chart our course for the next five years, the General Service Board perceives three critical functions for the spiritual Fellowship of Debtors Anonymous:

- (1) Attracting new members to DA,
- (2) Gaining the necessary resources for DA, and
- (3) Retaining members to grow the DA Fellowship.

### **(1) Attracting New Members to DA**

The vision of this Debtors Anonymous Board is that anyone who wants to attend a DA meeting be able to find one either in person, using a computer, by telephone, or as part of our “Adopt a Loner” outreach. Further, that throughout our communications channels, literature, publications, and web site we reflect the strong, vibrant recovery available through working the Twelve Steps of the Debtors Anonymous program and not debting one day at a time.

### **The Debtors Anonymous Web Site and Telephone Outreach**

The Debtors Anonymous web site serves as a powerful tool not only for the DA Fellowship but also for reaching those communities who may not know of the existence or the success of the Debtors Anonymous program. At this time, there are seven American states that have no registered DA meetings: Alaska, Alabama, Arkansas, Delaware, South Carolina, South Dakota, and West Virginia. Five states have only one meeting each: Iowa, Louisiana, New Hampshire, Wyoming, and Utah, while five states

have only two registered meetings per state: Kentucky, Idaho, Montana, Nebraska, and Oklahoma.

There are 16 registered meetings in Canada. Five provinces (Nova Scotia, New Brunswick, Manitoba, Prince Edward Island, Newfoundland, and Labrador) have no registered DA meetings. In Central and South America there are six registered DA meetings: one each in Mexico and Argentina and four in Brazil. In Europe there are a total of 20 registered DA meetings: one each in Denmark and Finland, four in France, two in Germany, two in Ireland, two in Spain, and eight in the United Kingdom. There are three registered meetings in Israel, six in Australia, two in New Zealand, and one in South Africa.

Over the next five years, we envision a redesigned web site affording easier access for new members and further accommodating the needs and suggestions of our DA community. As a Board, we strive to become acquainted with new technologies and have implemented any opportunities technology might offer to carry the message to the debtor who still suffers. Thus, the innovative web site searchable meeting feature allows a visitor to quickly find a DA meeting by simply entering the relevant zip code information. This new system, developed in conjunction with professional programmers and extensively tested by the Info Tech committee, is now maintained by our Debtors Anonymous office personnel.

The “real time” feature of the database allows for immediate updating of meeting times, locations and contact information. Over the next five conference years, this innovation will provide both immediate and long-term benefits. First, it corrects the often-reported problem of newcomers traveling to meetings only to discover they have moved or disbanded. Second, it affords the opportunity for an accurate count of all registered DA meetings. Third, new analytical software has the capacity to track and provide the statistical information so important to the DA Fellowship. For example, we know that from January to November 2008 we recorded 1,957,438 web site hits. Further, we can track how different sections of the site are used and the numbers of documents and periodicals downloaded.

We are dedicated to enhancing and developing the Recovery Stories page on the DA web site, providing strong examples of DA recovery: one debtor sharing and speaking directly to another. These stories reflect not only the diversity of our DA Fellowship but also the spiritual recovery available to those willing to work the Twelve suggested Steps of Debtors Anonymous.

Additionally, the revamped telephone system for the first time allows callers to contact DA toll-free, speak with a staff member, leave a message, or automatically access

certain types of basic DA information. The English language service is up and running, and Spanish language will soon be added.

### **Media & Professional Outreach**

We are increasing to at least 30 a regionally diverse pool of committed non-debting DA members familiar with the telephone training provided by the WSC Public Information committee.

In 2008, newspapers with a circulation of 100,000 or more, as well as a number of magazines, radio, and television outlets, received a letter from the General Service Office introducing the Debtors Anonymous Fellowship and explaining our spiritual Tradition of anonymity. This outreach will be continued and expanded on a yearly basis. Beginning with the 2008-2009 fiscal year, the GSB approved a WSC PI Committee proposal to dedicate \$3,000 to be used to rent booths and provide literature at national conventions for helping professionals.

### **Literature**

Our literature serves as the Conference-approved voice of our experience, strength, and hope and is one of our greatest tools for attracting new members. We envision a Fellowship that is better able to carry the DA message to the still suffering debtor through the timely publication of additional DA literature.

The objectives and goals for literature for the next five years are:

- To produce and publish at least one new full-length DA book as part of a joint effort with the WSC Literature Committee.
- To ensure that all DA literature contain a consistent message of our primary purpose of not debting one day at a time. To this end, a review of all existing literature will be completed.
- To continue, while always honoring the literature approval process, the implementation of ways to streamline the process of creating proposed new DA literature.
- To make DA literature available in other languages.
- To create a pool of qualified writers for future DA literature projects.

### **(2) Gaining the Necessary Resources for Debtors Anonymous**

While the Debtors Anonymous General Service Board of Trustees assumes primary leadership for larger matters of overall policy, finance, and custodial oversight, the Finance Committee makes recommendations on managing the Fellowship's financial

resources. The Finance Committee's primary purpose is to see that our General Service Office, General Service Board, and the World Service Conference Committees remain financially sound. The Committee, ever mindful that this is a spiritual purpose, prudently creates our Income and Spending Plans. It keeps a watchful eye on our revenue and expenditures and makes any necessary adjustments. When appropriate, the Finance Committee recommends that the General Service Board set aside sums in the Fellowship's Reserve Fund. For this Five-Year Plan 2009-2014, we have decided that the Fellowship would best be served by assuming that our financial contributions and literature sales will remain at present levels. As stated in the DA Promises, "We will live within our means yet our means will not define us." However, for the Prosperity Spending Plan, we envision the possibility that contributions from the Fellowship will in fact double.

The Board continues to ensure that reserves are appropriately invested in the best interests of the DA Fellowship. After much research necessitated by recent federal legislation, it is the Board's intention to have a General Service Board Audit Committee in place for the 2010 conference year.

The GSB will continue to encourage and support the Resource Development Committee (RDC) in exploring ways for the Fellowship to become increasingly self-supporting. The Board is revising and expanding a DA Treasurer's Manual from a draft document suggested by the 2008 RDC. The Board will provide clear, detailed financial reports each year at the World Service Conference and in the *DA Focus*. It is developing a written DA Financial and Investment Policy Statement and will continue to apply all of the policies and procedures of the Finance Committee.

### **The General Service Office**

The General Service Board oversees the operation of the General Service Office in Needham, Massachusetts, and works with the staff to ensure that the Fellowship is served in an efficient and effective manner. The Mission Statement of the GSO is "to provide consistent service and DA information to the suffering debtors, DA groups, and other interested parties. Using the spiritual principles of the Twelve Steps and Twelve Traditions, the GSO facilitates communication and unity within DA and meets the challenges and needs of a growing fellowship with professionalism and compassion."

The Board has signed a five-year lease for the Fellowship's Needham, Massachusetts, office. This is the first long-term office lease in our Fellowship's more than 30 year history. It allows not only for substantial savings on rent, and assures long-term stability

through 2012 for our office operations. The Board will continue, with the input of the WSC, to review the efficacy of this geographical location to best serve, given our financial resources and the needs of the DA Fellowship. The Board has hired a new part-time employee and is in the process of staffing a DA Office Volunteer Program, including both local DAs and those who can serve via the Internet. In the next five years we would like to hire an additional full-time employee. Our goal is to have the most technologically sophisticated office our spending plan can afford by providing effective training for the DA office staff.

### **Archives**

Another resource of the DA Fellowship is the irreplaceable collection of records and mementos of the past 32 years of DA history. Our ultimate goal within the next five years is to create a living historical time line on the DA web site, displaying inspiring highlights in the Fellowship's history. The General Service Board has secured rented space for the archives in a temperature and humidity controlled facility near the GSO office in Needham, Massachusetts. The Board has requested and will continue to request donations of papers, photographs, regional and national newsletters, and conference speaker audio tapes to be stored at this rented facility.

### **The Debtors Anonymous Board**

As stated in our Ninth Concept, "Good leaders together with appropriate methods for choosing them are necessary" to shepherd the growth of our DA resources. Over the next five years, the General Service Board will strive to attain and maintain its authorized full membership of 15 Trustees: 12 Class A (debtor) and 3 Class B (non-debtor) Trustees. While actively recruiting new Trustees, the same high standards and qualifications will be maintained for the election of both Class A and Class B Trustees.

We will continue to encourage an ethic throughout the DA Fellowship that views service at all levels as an honor and a privilege, and that considers the selection of trusted servants as a sacred trust, not an act of filling positions from a sense of deprivation or desperation.

The regional boundaries used to govern the eligibility for election of GSB members continue to be studied. This conference year, the GSB restructured the regions and

created a new region in the area of the Rocky Mountains, where DA has shown recent noticeable growth.

The GSB Trustee Manual will be revised and completed. Any outstanding issues related to the recruitment and election of Trustees and Appointed Committee Members will be clarified and codified. Copies of the finished manual will then be made available to all current and incoming Trustees.

### **(3) Retaining Members to Grow the DA Fellowship**

There has been much discussion both within the Board and throughout our World Service Conference structure as to how to grow the DA Fellowship. In 2006, the WSC voted to “establish a Regional Trustee Selection Study Commission to evaluate the selection, by geographic and cyberspace region, of Class A Trustees of the General Service Board.” In 2007, the Study Commission stated “this is the time to proceed in unity for the growth of Debtors Anonymous. We have been asked as a fellowship to refocus on our primary purpose to carry the message to the debtor who still suffers... More importantly, we believe that any approach to regionalization must be an organic outgrowth of existing DA institutions and processes. We believe that for such an endeavor to succeed, we must have a consensus from the heart of our spiritual fellowship.... Any attempt to impose change no matter how well intended will fail without a vision that arises from the Fellowship.” Further, the 2007 Study Commission suggested that established Intergroups act as an organic starting point for, and a foundational element of, any future regional organization.

In 2008, the reconstituted Regional Study Commission wrote, “We are in agreement with last year’s commission that there currently are not enough qualified trusted servants in Debtors Anonymous to have another service layer of regional assemblies that would elect trustees to serve DA as a whole on the General Service Board (GSB). We do believe that the two-pronged educational approach suggested by last year’s commission will help build the ranks of qualified trusted servants. Such an approach would involve the participation of the General Service Office (GSO), the GSB, and intergroups in creating workshops on the Steps, Traditions, and service opportunities on the local, regional, national, and international level. Funding, planning, and staffing the workshops would be a joint effort of the GSB and intergroups.”

The Board believes that, as in other Fellowships, a strong culture of service will help strengthen and grow Debtors Anonymous. “Service to the fellowship is service to our Higher Power, to our fellowship, and ultimately to ourselves. When we become willing to

contribute, to give back, the God of our understanding meets us more than half way. We begin to experience the freedom from financial insecurity that is promised in the 'Big Book' of Alcoholics Anonymous. As our lives begin to change we continue to give from a newfound sense of gratitude. We notice a cycle, we contribute freely with joy and without expectation, we discover that all our needs are met. In gratitude, we are inspired to give again." (Source: the DA pamphlet *Service*).

In an effort to encourage and emphasize this culture of service, the Board voted in 2008 to begin a yearly rotation of the topics of Steps (2008), Sponsorship (2009), and Service (2010) at the World Service Conference Fellowship Day. The well-attended preconference telephone training sessions for GSRs and ISRs in 2008 will be expanded for the 2010 and later conference years to quarterly "World Service Beginners Meetings." These meetings will be open to all DA members and will focus on different aspects of World Service work: Concepts, Traditions, the DA service structure, and the work of the conference committees. The Board will continue to offer many opportunities for DA members to serve as a DA Trustee, as an Appointed Committee Member, as a participant on the media speakers list, as a member of the DA office volunteer outreach effort, or as a contributor to the *Ways & Means* or the recovery stories on the DA web site.

The GSB oversees internal communications for the DA Fellowship and seeks to carry the message of recovery to our own membership in a timely, reliable, professional manner within the guidelines of the 12 Steps, 12 Traditions, and 12 Concepts for World Service. The Board will publish our two quarterly newsletters, *Ways & Means* and the *DA Focus*, while maintaining the separate and distinct mission of each. We envision using the DA web site to its fullest potential for the broadest possible communication within the Fellowship. It is our intent to continue working with the committees of the World Service Conference and the DA membership as a whole to improve communication at all levels within Debtors Anonymous. The use of the E-News as a mass e-mail channel now affords a cost-effective and timely method of reaching the entire Fellowship with significant news and service opportunities.

Lastly, we believe that the publication of a DA Twelve Steps and Twelve Traditions book will mark a coming of age moment for the DA Fellowship. The Board has selected a writer for this publication. This book will honor the experience, strength, and hope of all those who have worked the DA program. This publication will redirect focus to our spiritual recovery, achieved by working the suggested Twelve Steps of Debtors Anonymous. Focus on a spiritual solution will help the Fellowship to grow by offering hope and a true and tested path of recovery to our DA newcomers and returning members. In addition, work will continue on the Daily Meditation Book.

## **TREND ANALYSIS**

### **Part 1: Overview of the Growth and Present State of the DA Fellowship.**

The first “official” DA meeting was held in New York in April of 1976. By 1982 there were five well-established meetings, all in Manhattan. Although there were several attempts, beginning in 1972, to start a meeting in Los Angeles, DA did not take permanent hold there until 1982. At this time, efforts were ongoing to start groups both in Boston and Washington. In 1991, the Fellowship Communications Committee published a new World Services Directory with 300 registered groups and 100 identified contact persons. Groups that had neither a GSR nor a contact person were referred to as “orphan groups.” Six countries outside the United States were identified as having Debtors Anonymous groups: Australia, Canada, the Caribbean, France, Ireland, and Britain.

In 1995 the group database was lost, leading to a 1996 decision to have the database handled by a private database management company. Subsequently the decision was made to return to in-house database management. The 1997 World Service Conference decided to recognize only groups re-registered by July 15, 1998, with all other currently-registered groups moved to the inactive file.

At the 2000 World Service Conference, the General Service Board reported: “After much effort we have an accurate data base demonstrated by the third revised Group Meeting Directory of DA groups and intergroups world wide...we now have 425 registered DA groups world wide in twelve countries and six continents.” The 2005 International Directory listed 467 meetings worldwide, including 8 online groups, 7 telephone meetings, and 48 registered international groups. California, with 87 registered groups, and New York, with 58, accounted for 35 percent of all registered DA groups.

When considering these numbers, it is important to remember that until the recent advent of the searchable on line meeting database, this Board, like the many that preceded it, relied solely on groups to mail in their individual contact information to the GSO. As stated in a 2006 meeting update request letter to the groups, “...meetings and members can change frequently, and changes frequently have often happened much more quickly than the fellowship could track. In some cases meeting lists and contact information have become seriously outdated. This has led in some areas to difficulty in locating meetings, an inability of the General Service Board to communicate with all groups, and confusion over how to determine the conscience of all DA groups on fellowship wide issues.” Obviously, there would have been groups that would have never registered and others that when they disbanded would not have notified the GSO.

Thus, as the method of collection had not changed for more than 20 years, the inherent inaccuracy in this data collection has remained consistent.

What the figures do illuminate is a Fellowship that in the first 15 years of its existence (1976-1991) grew from one tiny meeting to 300 and a worldwide presence. In contrast, during the 9-year period from 1991 to 2000, the number of registered groups increased by only 125, from 300 to 425. In still greater contrast, from 2000 to 2008, while there was an important expansion of Internet and telephone meetings and the international DA community, the number of registered groups did not significantly increase, but consistently hovered below the 500 mark.

While it is possible in some areas that more members may now be attending the same meetings, and groups come and go in any fellowship, overall, if the program were growing, we would expect to see an increase in the numbers of registered meetings. This is especially troubling in a fellowship whose very existence depends on the ability of one debtor to carry the message to another. Indeed, the wonderful paradox of recovery is that we cannot keep the gift of recovery unless we give it away.

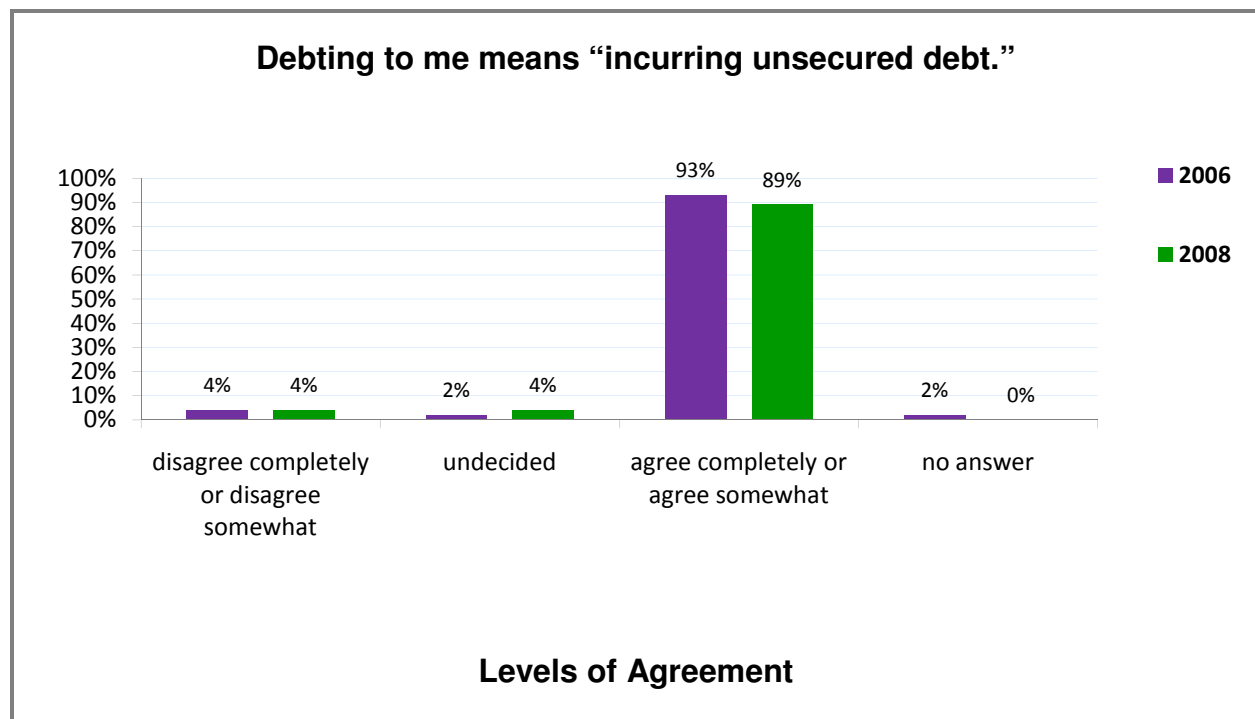
In some regions, there seems to be an ongoing churn of new members who find relief from using the DA Tools, participate for a time, and gradually drift away. Everywhere we hear reports of meetings with many newcomers and few, if any, old timers. Newcomers complain of the difficulty of finding sponsors or qualified members to participate on Pressure Relief Groups (PRGs). Members with years of recovery are unable to rotate out of service positions because others are unable or unwilling to step forward. Many report feeling “burnt out” on service and eventually leave.

Anecdotal evidence suggests that many new and long-time members leave feeling that neither their needs nor their expectations of material prosperity were realized. This turnover results in few members with long-term recovery and a continual “new membership” that is often uninformed of the spiritual recovery promised from working the Twelve Steps of Debtors Anonymous. This in turn begins to affect the whole Fellowship. Few members remain in DA long enough to fully understand the connection between doing service and maintaining their recovery. In many areas, three-quarters of all newcomers are from other Fellowships and may not view working the Twelve Steps of Debtors Anonymous with the same urgency they accord working the Steps of their first Fellowship. While this ability to attract so many “high bottom” newcomers and members from other Twelve Step Fellowships may be viewed as a mark of DA's success, what is undeniable is the lack of retention in our DA Fellowship.

These concerns led the Board at the 2006 WSC to report to the Fellowship that “Far and above any other issue that faces the Fellowship today is our need for strong clarity around our primary purpose. We come together for one reason; because we are

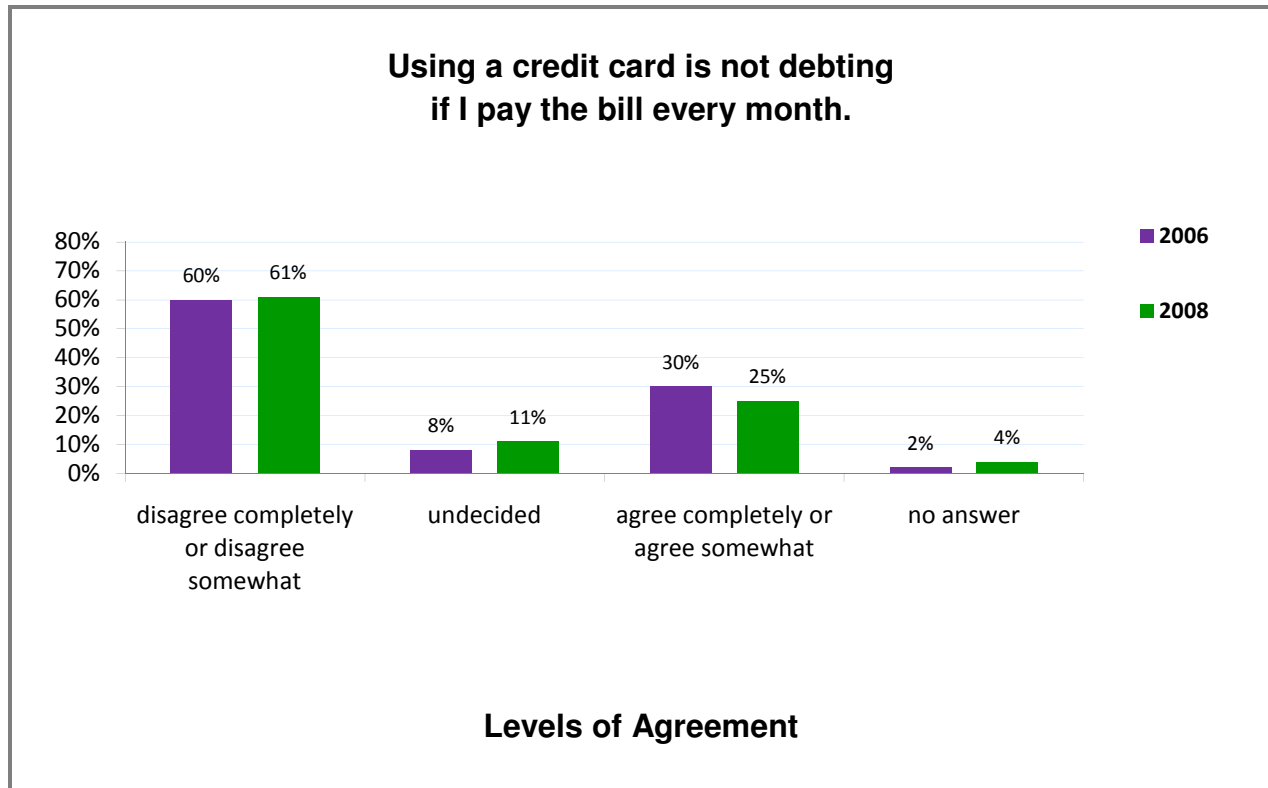
compulsive debtors and the only way we can not debt, one day at a time, is by helping another debtor practice the Twelve Steps. Any other focus waters down our message.”

Yet another result of this turnover may be a failure to appreciate some basic concepts of the DA program. At both the 2006 and 2008 World Service Conferences, the Board conducted surveys of Conference members relating to DA’s primary purpose. In response to Question 1, there was general agreement on the fundamental idea that debting means “incurring unsecured debt.”



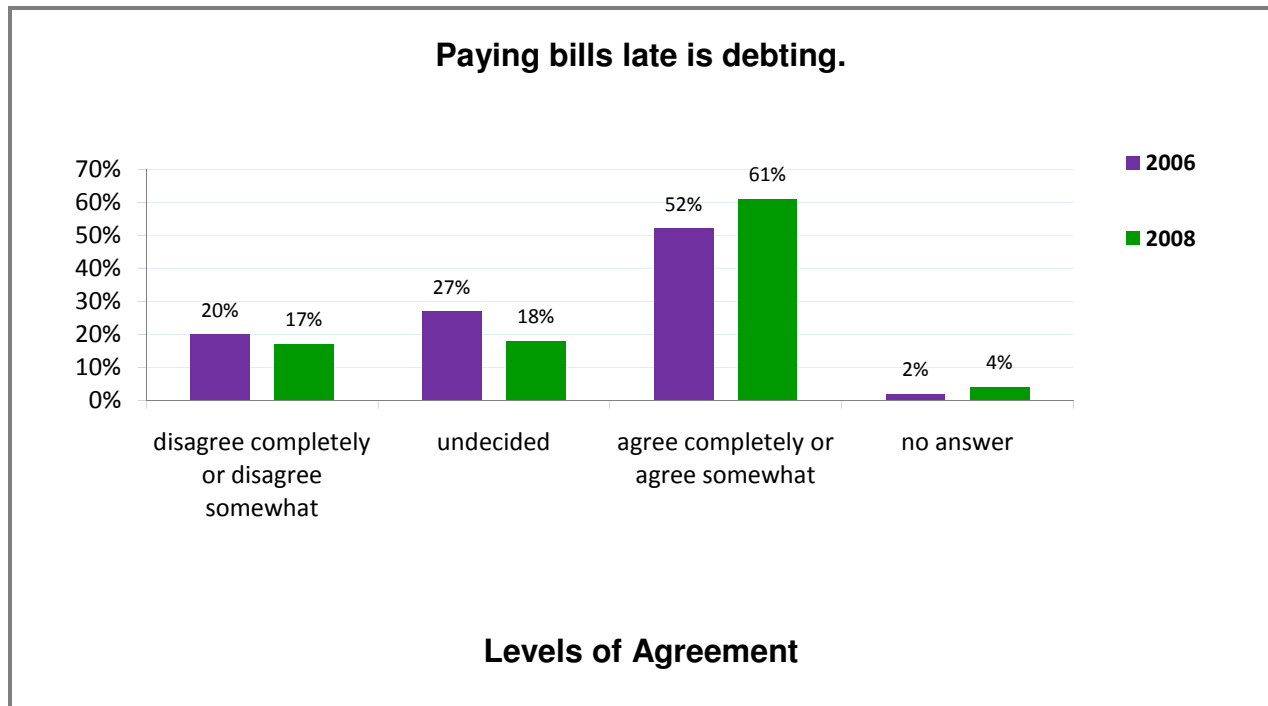
However, there was a surprising diversity of opinion when this general principle was

given a context. Thus, a significant percentage was not clear on whether using a credit card constitutes debting if the bill is paid every month (Question 3):



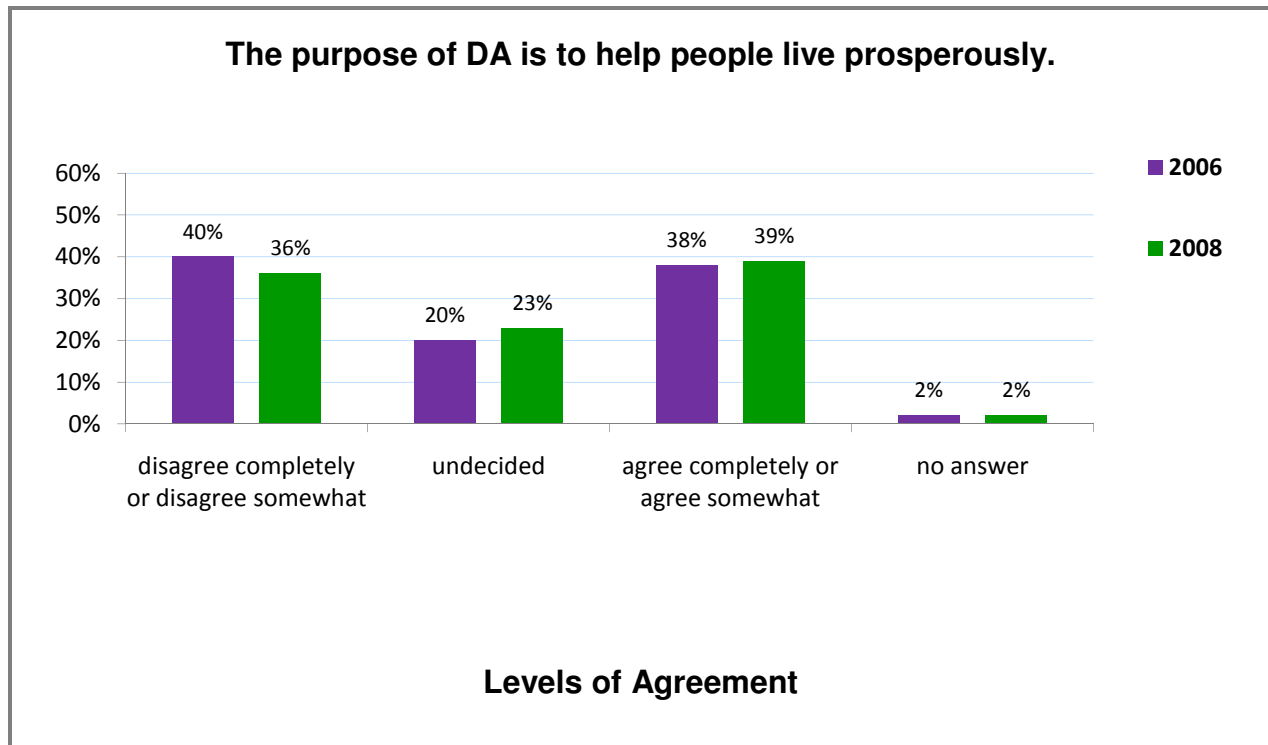
Only 52% of 2006 WSC members could agree that paying bills late is debting (Question

2). However, in 2008, that percentage increased to 61%.

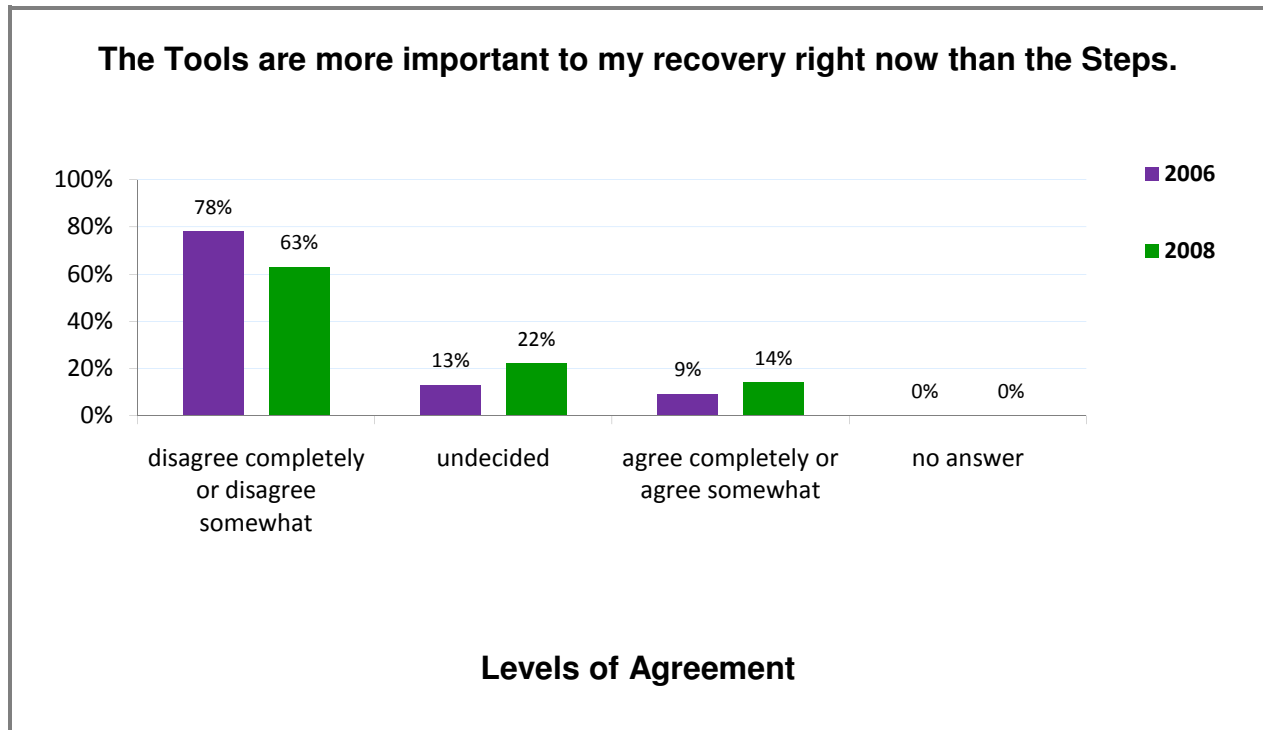


*Almost 40% agreed that the purpose of DA is to help people live prosperously*

(Question 6).



Finally, in 2008, only 63% of the respondents disagreed with the statement that the Tools are more important to my recovery right now than the Steps (Question 12).



See the Appendix for a complete copy of the results of the 2008 Survey.

## **Part 2: Looking at the Numbers – Finances**

We have accurate and verifiable figures on income and expenses going back for many years. Here are some of the facts obtained by a comparison between the figures for 1998 and 2008.

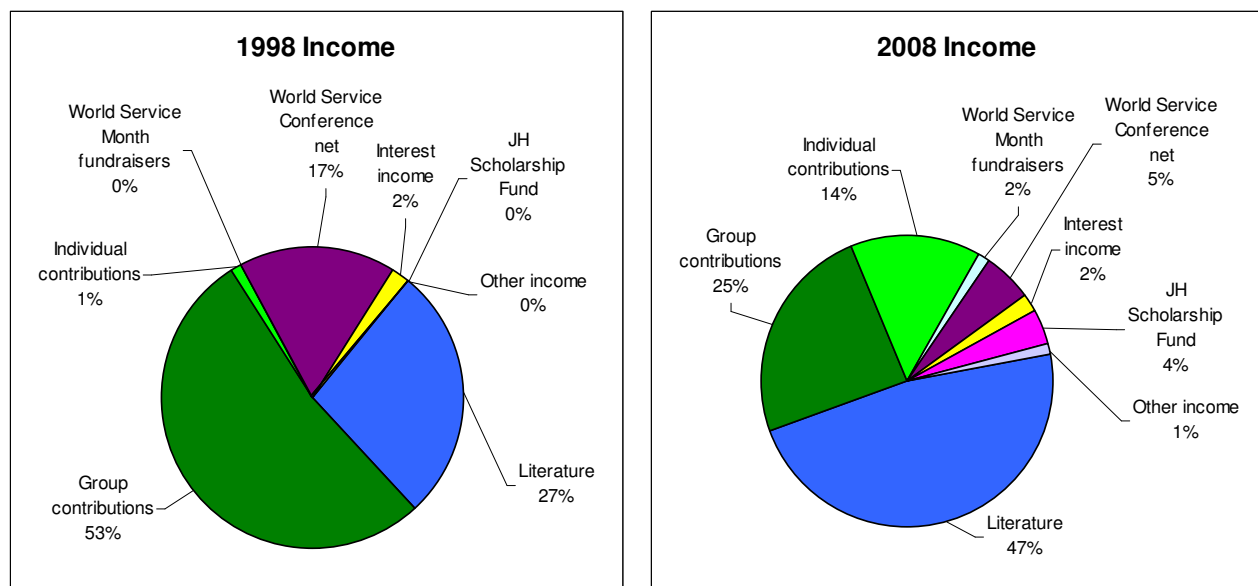
### **Income**

DA's income pattern has shifted somewhat over the past decade. In 1998, literature comprised about 27% of DA's income. Groups donated over half of DA's income, while individual donations were negligible. The net from the World Service Conference made up the balance of DA's income. (See pie charts.)

In 2008, however, the picture was quite different. Literature constituted almost half of DA's income, group donations dropped to 21%, individual donations increased dramatically to 18%, and the WSC contributed only 4%.

While the number of DA groups may have remained flat, DA's income has grown, thanks to literature sales and donations from individual contributors.

### **Sources of DA's Income – 1998 Compared to 2008**



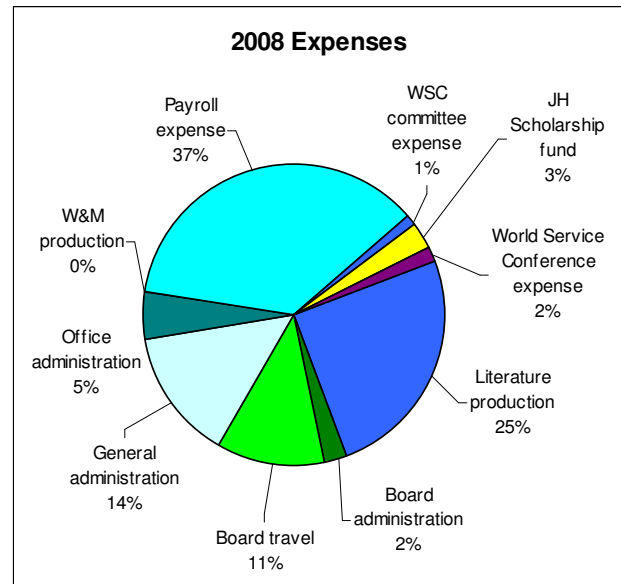
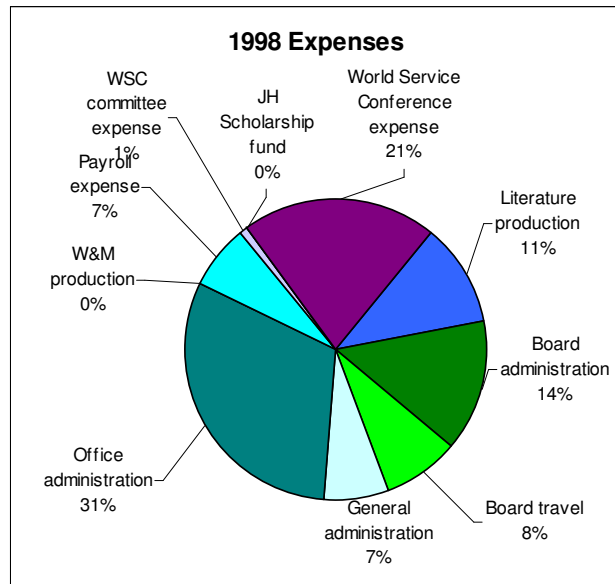
| 1998 Income                    |                 |             | 2008 Income                    |                  |             |
|--------------------------------|-----------------|-------------|--------------------------------|------------------|-------------|
| Literature Printing/Shipping   | \$ 24,136       | 27%         | Literature Printing/Shipping   | \$ 81,252        | 47%         |
| Contributions from groups      | 47,377          | 53%         | Contributions from groups      | 42,881           | 25%         |
| Contributions from individuals | 894             | 1%          | Contributions from individuals | 24,587           | 14%         |
| World Service Month fundraiser | 0               | 0%          | World Service Month fundraiser | 2,645            | 2%          |
| World Service Conference Net   | 15,197          | 17%         | World Service Conference Net   | 9,307            | 5%          |
| Interest Income                | 1,788           | 2%          | Interest Income                | 3,534            | 2%          |
| J.H. Scholarship Fund          | 0               | 0%          | J.H. Scholarship Fund          | 6,999            | 4%          |
| Other Income                   | 0               | 0%          | Other Income                   | 50               | 1%          |
| <b>Totals</b>                  | <b>\$89,392</b> | <b>100%</b> | <b>Totals</b>                  | <b>\$171,255</b> | <b>100%</b> |

Some future projects have the potential to generate income. For example, publishing another DA book will most likely increase revenues substantially; the reserves DA enjoys now are the result of sales of DA's first book, *A Currency of Hope (COH)*. However, sales of *COH* have flattened. Once a new book is published, it will be years before the revenues it generates will fully replenish DA's savings. Sales of pamphlets are growing slowly. Donations from groups and individuals fluctuate unpredictably from year to year. Unfortunately, DA, like other Twelve Step organizations, has not been able to become self-supporting through its own contributions as suggested by Tradition Seven. Too much of our income comes from literature sales and too little from group and individual contributions.

### **Expenses**

A comparison of DA's expenses from 1998 to 2008 demonstrates how important DA's General Service Office has become to the Fellowship in the past decade. In 1998, the DA office was marginally staffed and opened erratically. When DA hired a full-time office manager in 2001, DA made a commitment to the Fellowship to improve the office operations. Payroll is now the largest component of DA's expenses. Literature production has doubled as DA has added new pamphlets to its literature inventory. Board administration has decreased significantly due mostly to utilization of new communications technologies; however, the Board's travel expenses have increased somewhat. The method used to track the WSC income and expenses changed at some point in the past 10 years, to allow the local host committees to track the Conference's income and expenses. The Board began to report only the WSC net figure, which is why the WSC expense shows a zero amount.

### Sources of DA's Expenses – 1998 Compared to 2008



| 1998 Expenses          |                  |             |
|------------------------|------------------|-------------|
| Literature Production  | \$ 6,801         | 11%         |
| Board Administration   | 8,655            | 14%         |
| Board Travel           | 4,946            | 8%          |
| General Administration | 4,327            | 7%          |
| Office Administration  | 19,164           | 31%         |
| W & M Production       | 0                | 0%          |
| Payroll Expense        | 4,327            | 7%          |
| WSC Committee Expense  | 618              | 1%          |
| J.H. Scholarship Fund  | 00               | 0%          |
| WSC Conf Expense       | 12,982           | 21%         |
| <b>Totals</b>          | <b>\$ 61,820</b> | <b>100%</b> |

| 2008 Expenses          |                  |             |
|------------------------|------------------|-------------|
| Literature Production  | \$35,903         | 25%         |
| Board Administration   | 3,533            | 2%          |
| Board Travel           | 16,585           | 11%         |
| General Administration | 20,516           | 14%         |
| Office Administration  | 7,511            | 5%          |
| W & M Production       | 0                | 0%          |
| Payroll Expense        | 53,336           | 37%         |
| WSC Committee Expense  | 1,429            | 1%          |
| J.H. Scholarship Fund  | 4,230            | 3%          |
| WSC Conf Expense       | 2,328            | 2%          |
| <b>Totals</b>          | <b>\$145,371</b> | <b>100%</b> |

The DA General Service Board in recent years has focused on cutting spending because revenues are flat, and this strategy has resulted in consistent annual surpluses. The Board has gradually increased DA's prudent reserve. In most instances, the surplus funds are intended to be used for large projects repeatedly requested by the WSC, such as publishing a second DA book, moving to a larger office, hiring another employee, and redesigning the DA web site. At some point, it will be time to spend the savings set aside for these large projects. However, many of these projects will not generate revenue, but will actually increase expenses. For example, moving to a larger office and hiring a second employee will substantially increase DA's expenses on an ongoing basis.

### **Part 3: Literature for Recovery**

One bright spot for the DA fellowship lies in the area of literature publications. Since 1999 we have sold 23,152 copies of *A Currency of Hope*. We have ordered a total of eight printings as follows: two separate printings of 4,000 copies each in 1999, and 3,000 copies each year from 2002 through 2005. We did not place an order in 2006; however, in 2007 and 2008, 3,000 copies were ordered.

Also since 1999, besides *A Currency of Hope*, we have produced 14 pieces of literature: *The Twelve Signs*, *Service*, *The Numbers: One Approach*, *the Twelve Promises*, *Business Debtors Anonymous*, *Underearning*, *Monthly Recordkeeper*, *Spirituality*, *The Twelve Steps of Debtors Anonymous*, *Recovery from Compulsive Spending*, *"Just for This Day" Bookmark*, the *General Service Office* brochure, and the *GSR* brochure.

We have also revised the *Tools of Debtors Anonymous* and produced a 4-inch x 9-inch leaflet of the *Fifteen Questions*. Of the 19 pamphlets listed on the first page of the 2009 Debtors Anonymous order form, 14 have been produced since 1999. Of the nine pieces of Service Literature, seven have been produced and one has been rewritten in the same timeframe.

This is in contrast with the fact that in the 1993 *International Public Information Manual of Debtors Anonymous*, 17 years after the first DA meeting, the Fellowship could list only 13 pamphlets as available literature. For the seven years from 1999 to 2006, we saw the Fellowship double that number, add the first commentary on the *Twelve Steps of Debtors Anonymous*, and produce the first DA book, *A Currency of Hope*.

**Pamphlet Copies Sold: 2004-2008**

|                                                   |        |
|---------------------------------------------------|--------|
| The Monthly Record Keeper                         | 28,761 |
| The Twelve Steps of Debtors Anonymous             | 12,026 |
| Pressure Relief Groups & Pressure Relief Meetings | 10,210 |
| Spending Plan                                     | 10,096 |
| Recovery from Compulsive Spending                 | 9,725  |
| The Numbers: One Approach                         | 9,261  |
| Underearning                                      | 9,040  |
| Visions                                           | 8,471  |
| Spirituality                                      | 8,047  |
| Debtors Anonymous                                 | 7,666  |
| Debt Payment                                      | 6,200  |
| Communicating with Creditors                      | 5,800  |
| Awareness                                         | 5,592  |
| Business Debtors Anonymous                        | 5,415  |
| Meetings                                          | 3,510  |
| The Promises Leaflet                              | 3,260  |
| Twelve Tools Leaflet                              | 2,640  |

Also of note are the Board's efforts in the last 10 years to reduce the price of DA literature. In 2002, the hard cover version of *A Currency of Hope* was reduced to \$14.95 for sale on Amazon.com or from the General Service Office.

We now offer a discounted price of 10 copies for \$100.00 or t20 for \$175.00. The individual copies can also be purchased for \$12.45 from the order form, a reduction of \$2.50 from the 2002 price.

A 1992 WSC motion reduced the price of literature to \$1.00 per pamphlet, six for \$5.00, and twelve for \$10.00. It is instructive to observe that in 2009, 11 individual pamphlets cost \$0.80 each while the Beginners Kit # 1 containing 10 pieces and Beginners Kit # 2 with eight pieces both retail for \$6.75. It is possible for a newcomer to buy 18 pamphlets and the *Currency of Hope* for \$25.95. In 2003 we instituted a very successful system where 25% of the retail price of all literature would be set aside in a separate fund to cover our reprinting costs. The only increase in costs to the groups has been in the area of shipping charges. The Board does not control this pricing and these costs have always been absorbed by the ordering groups.

Despite these successes, there has also been great disappointment over our inability as a Fellowship, in spite of many valiant efforts, to produce a DA *Twelve Steps and Twelve Traditions* book. DA has relied for many years—to the frustration of many newcomers—on the literature of Alcoholic Anonymous. The GSB has just entered into a contract with

an author (whose anonymity will be protected under the Eleventh and Twelve Traditions) to produce a book on the Twelve Steps and Traditions of Debtors Anonymous. The need for a volume directed at the specific problems of compulsive debtors has been painfully obvious for some time. A book that integrates the unique characteristics of the DA program with the spiritual growth and development of Twelve Step recovery will provide a strong foundation for the future growth of DA. A compelling and lucid analysis of the Traditions will help the Fellowship better understand the spiritual responsibilities of service and self-support.

Both the Literature Services Committee and the Literature Publications Committee have decided to focus on this new book as a priority over the development of other literature. A timeframe for the production of a *Twelve Step and Twelve Traditions* book will be discussed in the Action Plan portion of this report. Work is also proceeding with the compilation of a Daily Meditation book.

#### **Part 4: Communication Within and Outside the Fellowship**

There are three levels to any discussion of communication as it applies to a Twelve Step Fellowship:

- How well do we carry this spiritual message of recovery to the one who still suffers?
- How well do we respond to and supply information to the media and helping professionals?
- Internally, how well do we as a Fellowship communicate throughout the service structure?

#### **How well do we carry this spiritual message of recovery to the one who still suffers?**

As the table above indicates, since 2004 we have sold 156,385 copies of the various DA pamphlets. In the nine years since first publication, we have sold 23,152 copies of *A Currency of Hope*. We have had 817,306 page views at our web site, where at the end of 2008, 50 downloads were available for free. We see an encouraging increase in Internet and telephone meetings; there are currently 21 registered telephone meetings and 8 Internet meetings. In 2003, the Prison Caucus became the Hospital, Institutions and Prisons Committee (HIP) of the World Service Conference “to encourage this committee's development at intergroup level.”

*Ways & Means*, “our meeting in print,” has the dual purpose of serving current members and reaching our newcomer population. Besides the difficulties of increasing subscription participation, *Ways & Means* has historically experienced significant problems keeping to a predictable publication schedule. An even bigger problem confronting the publication has been the difficulty in finding members willing to write and share their DA stories.

From 1989 to 1993, *Ways & Means* subscriptions fluctuated between 84 and 283. In 2002, 2003, and 2004 we saw paid yearly subscriptions totaling 165, 193, and 194, respectively. Hence, over a 15-year period, even with the employment of a paid editor and many different helping strategies, the magazine was unable to attract even 300 paid subscriptions. This led to the decision to make *Ways & Means* available only through download at our web site. While we have only recently become able to track the number and nature of downloads at [www.debtorsanonymous.org](http://www.debtorsanonymous.org), we see encouraging improvements in the quality and reported response to recent editions. Further, there has also been a return to a predictable publication schedule.

### **How well do we respond to and supply information to the media and helping professionals?**

In 2005, the Board created the volunteer position of Media Contact Person (MCP) in an effort to guarantee that media requests were processed in a timely manner. The Board decided this year, in view of the increasing responsibilities of the position, to return this function to the GSO. We have a portal on the web site for information for the media and helping professionals. In the first year of the program, we had 75 executed requests. Today we receive approximately five requests per month. We are also in the process of recruiting more DA members who have completed a training provided by the WSC PI committee to serve as media speakers.

Since 1993, we have published a *Public Information Manual* with an extensive collection of model contact letters addressed to the media, helping professionals, and the general public. In 2003, the *PI Manual* was posted on the web site as an accessible resource for our entire membership. Yet we hear little evidence of this valuable resource actually being used by DA Intergroups. Much discussion has ensued at all levels of the World Service structure as to the difficulties of encouraging the Fellowship to carry the DA message of recovery. As stated in the *Meetings* pamphlet, “some of us have been reluctant to tell our stories, because of shame, secrecy, personal history, or other reasons.”

Additionally, for the past three years we have mailed a yearly letter to newspapers with a circulation of over 100,000 as well as selected magazines and radio and TV networks to inform them of both our primary purpose and our policy of anonymity. For the first time last year, the Board authorized funds to allow DA participation at professional conferences. As a result, with the assistance of CADA (Capital Area DA), we were able to staff a booth at the 2008 AARP Convention. We have at present no available statistical information from past outreach endeavors.

**Internally, how well do we as a fellowship communicate  
throughout the service structure?**

As noted above, *Ways & Means* serves the dual function of reaching out to newcomers and established members. The *DA Focus* primarily serves our existing membership. The *GSB Quarterly Newsletter*, which became the *Board Call* and subsequently the *DA Focus*, “the quarterly World Service Newsletter for the fellowship of Debtors Anonymous,” first went to print in 1998. In 2002, the Board voted to feature the *Board Call* on the DA web site. From 2007 to 2008, the *DA Focus* recorded an average of 1,004 hits per issue or an average of 1.40 percent of all hits at the web site. The *DA Focus* continues to be distributed by mail to all DA groups. Likewise, to communicate the scope of business undertaken by the World Service Conference, the yearly WSC reports have grown from the 20-page documents of 1991-1997 to 75 pages in 2008. DA WSC reports covering 15 conferences of our Fellowship's history are now available for download at the web site.

Like the web site and *Ways & Means*, the General Service Office (GSO) serves newcomers and longstanding members, as well as the general public. Over the years, the GSO has had a varied history, first as a struggling, part-time office in New York and now as a permanently staffed office located in Needham, Massachusetts, just outside Boston. One full-time and one part-time employee currently work there to serve the Fellowship throughout the world. The GSO handles literature orders, inquiries from within and outside the Fellowship, maintenance of our online meeting database, mailings, communications, and files, among other functions. The General Service Board has signed a five-year lease for the Fellowship's office. This is the first long-term office lease in our Fellowship's more than 30-year history. It allows not only for substantial savings on rent, but also assures long-term stability through 2012 for our office operations.

DA has a service structure that places the DA groups at the top of the organizational chart and the DA Board at the bottom. As so well stated in the *GSR* pamphlet, the GSRs “not only receive information from the GSO, [but] also transmit your group's

ideas, opinions, and local news to the office and the Board. You help all of DA's trusted servants to keep a 'hand on the pulse of DA.' With your feedback, the GSO and the GSB can better understand and respond to your groups needs." So, in many ways, while our service publications, DA web site, and E-News allow us access to a numerically larger community, we, as a Fellowship, often mainly rely on the link of that one trusted servant carrying information between the group and the WSC or, at the local level, between the group and the Intergroup. The question for the Fellowship and one often considered by the Board is: if, as stated by the Regional Trustee Study Commission, we are unable at this time to create an area or regional service structure, how can we reach the approximately 80 percent of registered DA groups who may not have a GSR?

One of the hallmarks of a growing organization is a struggle to create effective communication channels between all its service entities. Yet we hear of instances where, because needed information was not communicated, the General Service Board was accused of being secretive and withholding. This problem is not confined to the world conference level of service; we hear frequent reports of failures to communicate at the group and Intergroup levels also.

A 1996 Intergroup survey "drew responses from 7 of 17 intergroups and contributes in some part to the conclusion that the current infrastructure isn't efficient." The vision for the Infrastructure 2000 plan adopted by the WSC was "to have a working regional infrastructure to communicate between the fellowship and the service board as well as laterally between the intergroups." This has not materialized beyond the meetings of the Intergroup Caucus at the WSC and throughout the year by telephone conference.

The DA web site has been an invaluable tool for communication both within and without the DA Fellowship. The official DA web site, [www.debtorsanonymous.org](http://www.debtorsanonymous.org), which was designed by a sub-committee of the WSC PI Committee, came online on January 15, 1998. The design criteria and goals were listed as follows:

"The site would have a simple design with minimal graphics in order to maximize the loading speed irrespective of the computer or modem. The site would provide as much information as possible without jeopardizing our copyrights. Our goal with newcomers would be to introduce them to the concepts of DA, but to ultimately try to get them to a meeting as fast as we can. The site would NOT generate more work for an already overtaxed GSO."

The site usage report stated, "in the first three months after we brought the site online, we would receive about 200 hundred hits per day from about 35 unique computers. In May, we registered our site with several search engines including Yahoo."

In 2009, most of the goals stated 10 years earlier have been realized. A newcomer can

almost immediately attend either a telephone or an Internet meeting or read one of the 14 recovery stories on the web site. We have a web site where for the first time, with the searchable meeting list, we are moving closer to having a real-time current count of all DA groups. Both *Ways & Means* and the *DA Focus* are available as free downloads. There is a portal *En Español*, a commitment to the diversity of our DA fellowship. Information is also available on the “Adopt-a-Loner” program to help the isolated DA member. There are free downloads for literature, service materials, and information on upcoming events. This year, for the first time, the WSC Registration Packet has been made available for viewing and download. While those groups without computer access were given the option of requesting a physical copy from the GSO by mail, the savings in mailing costs alone amounts to approximately \$500.00. We have begun the process of archiving the reports of all prior WSCs on the web site. All of these changes and additions to the web site have necessitated a review and redesign that will occur over the next few years.

We have recently instituted the E-News service to assist in communication within the Fellowship. It may also be used to communicate with those outside the Fellowship, as was the case with a letter sent to college counselors last year. Although the E-News appears to have been greeted favorably, it is still too early to know how effective this new tool may be.

### **Service and Self Support**

After having read through 20 years of World Service Conference reports for this Five-Year plan, one cannot help but be touched by the hard work and dedication of the many trusted servants who have helped the DA Fellowship survive and grow. Yet that being said, we find ourselves today at every level of the service structure unable to fill the positions necessary, in some instances, even to continue or to grow a flourishing fellowship. Of the 20 registered DA Intergroups, only eight were able to respond to a 2008 Regional Trustees Special Study Commission survey that was intended to ascertain if the Fellowship could support another level of service. Only one of the responding Intergroups had all of its service positions filled. The New England Intergroup had accomplished this because members held more than one position (see table).

|                     |                                                                                                                                                                                                                                                                                                                         |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Florida             | 8-10 members attend Intergroup regularly. We currently have 2 service positions open: Vice Chairperson and Public Information Officer.                                                                                                                                                                                  |
| Hawaii              | [We] just had our second meeting (4 attended the first & 5 attended this month). Five of 7 officer positions are filled: Outreach Chair & Phone Coordinator are currently open.                                                                                                                                         |
| Las Vegas           | [not applicable]                                                                                                                                                                                                                                                                                                        |
| Minnesota           | 4-6 people usually attend. No, not all the service positions are filled.                                                                                                                                                                                                                                                |
| New England         | Intergroup typically has 8-10 members present at any given meeting. This number may increase when special projects/events are being planned. There are 10 positions at NEIG, generally all are filled but one member may fill more than one position & it is not uncommon for a person to hold at least 2 positions.    |
| New York City       | Generally, approximately 15-20 members attend the monthly meetings. While attendance varies from month to month, the number of members in attendance is growing this year. The Intergroup has 12 standing coordinator positions and 4 officer positions. Presently, there are 3 vacancies in the coordinator positions. |
| Northern California | 10. Yes, only position open is event coordinator of Do DA Day.                                                                                                                                                                                                                                                          |
| Northern Lights     | We are a very small Intergroup (4 groups) and we average only 3 persons at our meetings. We have great difficulty filling service positions as only a few of the same people do service.                                                                                                                                |

The following were the replies to the question, "How can the DA Fellowship encourage more members to serve at the intergroup and GSR levels?"

|             |                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Florida     | By continually reminding members of the needs for & benefits of service at every level.                                                                                                                                                                                                                                                                                                                 |
| Hawaii      | I think when more people recover from compulsive debting, we will have a larger fellowship and more members willing to serve. So what can we do get more members actively doing the Steps.                                                                                                                                                                                                              |
| Las Vegas   | I think to encourage more people to serve at the upper level, the clearer the guidelines and responsibilities are laid out for people the less they will feel overwhelmed. The message of: "progress, not perfection" also needs to be repeated again and again. I think perfectionism scares a lot of people off. The desire to make DA better needs to be stronger than the fear of making a mistake. |
| Minnesota   | Sponsors should encourage their sponsees to do service. Service is one of the tools and to reiterate that using the tools (including doing service at all levels) adds to individual recovery and group strength.                                                                                                                                                                                       |
| New England | Education of the rewards & benefits as well as hearing personal stories of the difference made through service at that level. Perhaps the DA Focus could include more personal pieces like that rather than only info about the fellowship.                                                                                                                                                             |

|                     |                                                                                                                                                                                    |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New York City       | [no response to this question]                                                                                                                                                     |
| Northern California | Provide shorter terms to serve so there is a greater turnover of positions and more availability to serve. Provide teleconference meetings with other intergroups and GSR meeting. |
| Northern Lights     | We need to educate new members about service, and sponsors need to stress the need for active service work with their sponsees.                                                    |

The GSB has an authorized membership of 15 but has always varied in numbers over the last 27 years. The Board has not exceeded 13 in number over the past six years and three of these have been Class B Trustees, in other words, "non debtors." In 1991, when there were 57 delegates at the WSC, there were 11 Trustees. While Appointed Committee Members have contributed greatly to the work of the Board, this year they number only three. An effort to enlist volunteers to work over the Internet with the General Service Office has netted a total of only 20 members. In a recent conference year, 50 percent of all the GSRs who had joined the various World Service Conference committees were no longer available five months after the Conference to perform service.

In DA's early years, our founder John H. often wryly commented on his experience of the contradiction between the grandiosity and idealism of our membership and the apparent lack of willingness of the same members or groups to pay for these desired services. Likewise, the minutes of many World Service Conferences reflect a variety of wonderful visions for abundant DA spending plans, which mysteriously never came to fruition.

At the international level, as well as that of the Intergroup and local group, many fine projects designed to do Twelfth Step work and "carry the message to the debtor who still suffers" fail to come to fruition because the same few groups that contribute regularly cannot give any more, and the same few individuals who are willing to do regular service become burned out and cannot do more.

We as a Fellowship have come a long way from the 1992 World Service Conference announcement that there was \$529.65 in the treasury or the 1995 Board expression "of deep concern and alarm about the current financial situation facing DA as a whole. The quarterly income averaged \$8,856 while the average expenses were \$8,873. This does not include funding for the production of existing and new literature, conference committee work, GSB travel, nor the recovery book." Nevertheless, in 2008 only 270 of our 467 registered groups made a contribution to the GSO. It is a fact that many DA members belong to more than one Twelve Step Fellowship. These multiple memberships increase the financial responsibilities on individual members who are presented with multiple Seventh Tradition baskets. Also, without a regionalized or area

structure, the burden of sending a GSR to the World Service Conference falls squarely on the individual groups. This yearly expense, often amounting to several thousand dollars, obviously affects funds that might otherwise be available for the World Service structure. An unanticipated profit from the well-managed 2008 WSC has allowed the Board to allocate \$10,000 towards the registration costs at the 2009 WSC. Hence, the registration fees for both GSRs and ISRs will be reduced by \$100 each.

Possibly DA's greatest difficulty may be that so many of its members have bold, optimistic hopes for the Fellowship but are rarely willing to contribute either their financial resources, time, or energy to achieve them.

### **ACTION PLAN**

The General Service Board has compiled the following suggested Action Plan, presuming first that the Board will; achieve its requirement of fifteen serving trustees over the next five years and that our DA contributions and literature sales will sufficiently increase to fund these stated goals.

#### **Attracting New Members**

1. **Web site.** By 2010, we will complete a redesign of the DA web site including an increased body of stories illustrating recovery through working the Twelve Steps. The GSO will continue to update our database of meetings, making accurate information available to all those who seek DA. Statistical reports of web use and download numbers will be prepared for Board review.
2. **E-News.** We will expand the use of our E-News capability. With an appropriately targeted mailing list, for example, it is possible to reach the professional community at a cost significantly below regular postage rates.
3. **Media Contacts.** Our goal is to expand the pool of DA members available for interview who have completed a media speaker training workshop. When possible, we are committed to an immediate response and fulfillment of these media requests. It should also be possible over the next two to three years, with the help of DA volunteers, to utilize the E-News to contact many more newspapers, magazines, television, and radio outlets.
4. **Conventions and Conferences for Professionals.** The successful outreach at the 2008 AARP Convention underlines the potential that these conferences provide to carry the DA message of recovery. While large national conventions may be too

expensive for us to utilize effectively, local and state meetings may be attended with financial effectiveness. In the next two years, our intent is to participate in three such professional gatherings each year. Our five-year goal is to participate in at least eight such professional local, state, and regional meetings per year.

5. **Twelve and Twelve.** The GSB has approved a contract with a writer to produce DA's own study of our Twelve Steps and Twelve Traditions. The contract calls for production of a first draft 14 months from signing, and a second draft from the contracted writer 18 months from signing. This second draft should be available to the Conference Literature Committee in the 2011 or 2012 conference year. Approval by the World Service Conference in 2013 is a distinct possibility.
6. **Review of DA Literature.** The Conference Literature Committee is currently engaged in a review of all DA literature. This review should be completed by the 2010 WSC. We as a Fellowship can then confidently affirm that our literature contains a consistent statement of our primary purpose, to stop debting one day at a time and to help other compulsive debtors to stop incurring unsecured debt. Reformatting and republishing of this literature will be completed over the next five years.
7. **Translations of DA Literature.** The GSB is currently exploring the costs involved over the next three years of employing professional translators to produce our literature in both French and Spanish. By 2011 we expect to publish materials already donated by our volunteer translators. The Board is also exploring the acquisition of a Spanish language web site created by DA members. It should be possible to accomplish this goal in the 2010 conference year.

### **Gaining and Preserving Necessary Resources**

8. **Audit Committee.** The first step towards creating an Audit Committee was taken by the GSB in December 2008 when it approved an amendment to the Bylaws. The Audit Committee will provide a place for long-term financial planning and oversight. The Committee will begin operation in the 2009-2010 conference year.
9. **Treasurers' Manual.** The GSB is currently engaged in producing a new piece of service literature from a draft suggested by Resource Development Committee in 2008. This *Manual for Group Treasurers* will provide guidance to those who may not be familiar with the responsibilities inherent in the job of Treasurer. It will provide suggestions for efficient management of group resources. The Manual should be available at the 2009 Conference or shortly thereafter. When approved, the Manual will be placed on the Service page of the DA web site and be available for all to use.

10. **Coherent and Transparent Policies.** The Finance Committee of the GSB will finalize the GSB Investment Policy Statement. The statement details principles that will govern how we conserve funds available to the GSB while maintaining a necessary financial flexibility. Additionally, the Finance Committee will develop a statement covering its composition, scope, and procedures to guide current and future members.
11. **Contributions.** The GSB will encourage and support the Resource Development Committee of the Conference in its efforts to explore ways in which DA can become self-supporting. While no Twelve Step organization is entirely self-supporting through its own contributions, we hope to improve the balance between literature income and contributions that currently exists in DA. The creation of a Twelve and Twelve will place increasing pressure upon this balance. Therefore, to live within the spirit of our Seventh Tradition, it will be necessary for groups and individuals to increase contributions to meet that goal. We hope that efforts to increase membership will also serve to increase contributions and literature sales income.
12. **General Service Office Staff.** One goal within the next three years is to increase the effectiveness of the General Service Office by hiring an additional full-time employee. As noted in the prior portions of this report, record keeping and statistical compilation have not been the strong suits of the DA Fellowship. We need to know where we are and where we have come from in order to have a clear vision of where we can travel. This new employee could help coordinate outreach efforts, convention planning, organization for the WSC, and provide staffing when the current Office Manager is not available.
13. **General Service Office Location.** The current location of the General Service Office will serve us well for the next three years. The Board will begin in 2011 to review, with the help of the WSC, the efficacy of this geographical location. The addition of a second full-time employee and the increasing use of office volunteers point to the need for more office space within the next five years.
14. **General Service Office Functions.** It is our intention that the General Service Office will assume additional functions over the course of the next few years. The need for increased statistical analysis has already been noted. In addition, the Office has taken on the financial registrations for the World Service Conference. If we are unable to afford a second full-time employee, the Board may seek the services of a professional outside consultant to plan the WSC. The possibility of a DA triennial convention would depend on the ability of the General Service Office to undertake a supervisory and planning role. Outreach to professionals at their own conferences and conventions should also be an ongoing function of the GSO. The General Service Office could also provide the necessary continuity for the acquisition,

preservation, and consolidation of DA's Archives. Finally, the Office should provide additional clerical and secretarial support to the over-stretched GSB.

15. **Composition of the General Service Board.** One of the recurring problems faced by the GSB has been the inability to recruit and maintain a full Board membership. As noted earlier, it is the vision of the Board to increase its membership to a full complement of 15. A more likely scenario will be an increase in number to 13 by 2010 and 15 by 2011 or 2012. We have been blessed with a number of hard working, dedicated, and talented GSB volunteers. Our concern, given the difficulty of the Board's workload, is to ensure that we have a broad pool of future applicants. To this end, the Board will continue efforts to reach out to current and former Conference members who might contribute to the growth and development of DA. If sufficient funds and a full Board membership allow in the next few years, Board members will increasingly try to visit groups and Intergroups to share the spiritual and emotional benefits of DA service. In 2010, a revised *Trustee Manual* will be available to increase knowledge and understanding of the GSB's work and responsibilities.

### **Growing the Fellowship**

16. **Growth of a Service Culture within DA.** This Board is dedicated to carrying the message of DA's primary purpose of not debting one day at a time achieved through working the Twelve Steps and performing service for the debtor who still suffers. At this time, the GSB has neither the time nor the personnel to act on the Regionalization Study Commission suggestion to establish regional/Intergroup workshops composed of Trustees, GSO staff, GSRs, and ISRs to explore issues facing DA.
17. **Communication within the Fellowship.** We can build upon our current means of communication within the Fellowship to ensure that we have an informed and knowledgeable membership. Efforts will be made to expand our E-News mailing list by sending a timely reminder to re-register. *Ways & Means*, our quarterly electronic meeting in print, is always considering ways to serve the DA Fellowship, as evidenced by the continued improvement in the quality of the presentation, depth of the recovery stories, and reverence for DA's rich history.
18. **Literature.** As noted earlier, the development of a Twelve and Twelve within the next three to four years is one major way to improve our outreach efforts to newcomers. While the Step pamphlet is an excellent piece of literature, it does not have the depth or scope to explain the Steps in all their spiritual grandeur and critical importance to lasting recovery.

19. **Sponsorship.** Although we have discontinued printing of the *Sponsorship* pamphlet, it is available for download on our web site. Its availability should be better publicized. Groups should be actively and regularly reminded of its existence and encouraged to download it for use by their members. We also see the beginnings of a group sponsorship movement in the Fellowship of larger groups sponsoring smaller meetings across state lines. There are also two Twelve Step telephone sponsoring groups serving isolated newcomers.

## Debtors Anonymous Prosperity Spending Plan

|                              | ( A )                          | ( B )                          | ( C )                          | ( D )                                                | ( E )                       |
|------------------------------|--------------------------------|--------------------------------|--------------------------------|------------------------------------------------------|-----------------------------|
|                              | JULY, 2007<br>to<br>JUNE, 2008 | JULY, 2008<br>to<br>JUNE, 2009 | JULY, 2009<br>to<br>JUNE, 2014 | JULY, 2009 to<br>JUNE, 2014<br><br>(05%<br>Decrease) | JULY, 2009 to<br>JUNE, 2014 |
|                              | 2008<br>ACTUAL                 | Projected<br>ACTUAL            | Action<br>Plan                 | Action Plan                                          | Prosperity<br>Plan          |
| <b><u>INCOME:</u></b>        |                                |                                |                                |                                                      |                             |
| <b><u>Contributions:</u></b> |                                |                                |                                |                                                      |                             |
| Group                        | \$ 42,881                      | \$ 44,024                      | \$ 66,039                      | \$ 62,737                                            | \$ 102,723                  |
| Individual                   | \$ 24,587                      | \$ 32,050                      | \$ 48,075                      | \$ 45,671                                            | \$ 59,046                   |
| Inv. To Prosperity           | \$ -                           | \$ -                           | \$ 4,866                       | \$ 4,623                                             | \$ 5,000                    |
| World Service Month          | \$ 2,645                       | \$ 369                         | \$ 6,083                       | \$ 5,779                                             | \$ 6,100                    |
| Additional Book Appeal       | \$ -                           | \$ -                           | \$ 14,599                      | \$ 13,869                                            | \$ 15,000                   |
| <b>Sub-Total</b>             | <b>\$ 70,113</b>               | <b>\$ 76,443</b>               | <b>\$ 139,662</b>              | <b>\$ 132,679</b>                                    | <b>\$ 187,869</b>           |
| Interest                     | \$ 3,534                       | \$ 2,156                       | \$ 4,015                       | \$ 3,814                                             | \$ 4,500                    |
| Book Sales (COH)             | \$ 25,800                      | \$ 22,797                      | \$ 20,517                      | \$ 19,491                                            | \$ 28,500                   |
| Book Sales (12 & 12)         |                                |                                | \$ 25,000                      | \$ 23,750                                            | \$ 31,000                   |
| Pamphlets                    | \$ 42,237                      | \$ 39,655                      | \$ 43,000                      | \$ 40,850                                            | \$ 66,000                   |
| Shipping                     | \$ 11,863                      | \$ 11,985                      | \$ 16,907                      | \$ 16,062                                            | \$ 21,962                   |
| Other Sales                  | \$ 1,352                       | \$ 813                         | \$ 1,141                       | \$ 1,084                                             | \$ 1,400                    |
| John Henderson Fund          | \$ 6,999                       | \$ 1,621                       | \$ 8,516                       | \$ 8,090                                             | \$ 8,600                    |
| Misc. Income                 | \$ 50                          | \$ 456                         | \$ 213                         | \$ 202                                               | \$ 175                      |
| WSC Net Receipts             | \$ 9,307                       | \$ 17,000                      | \$ 8,516                       | \$ 8,090                                             | \$ 7,000                    |
| <b>Sub-Total</b>             | <b>\$ 101,142</b>              | <b>\$ 96,483</b>               | <b>\$ 127,825</b>              | <b>\$ 121,433</b>                                    | <b>\$ 169,137</b>           |

|                            |                   |                   |                   |                   |                   |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| <b><u>Total Income</u></b> | <b>\$ 171,255</b> | <b>\$ 172,926</b> | <b>\$ 267,487</b> | <b>\$ 254,112</b> | <b>\$ 357,006</b> |
| <b><u>LESS:</u></b>        |                   |                   |                   |                   | \$ -              |
| <b>Cost of Goods Sold</b>  |                   |                   |                   |                   | \$ -              |
|                            |                   |                   |                   |                   | \$ -              |
|                            |                   |                   |                   |                   | \$ -              |
| Pamphlet Printing          | \$ 21,004         | \$ 17,755         | \$ 19,221         | \$ 18,260         | \$ 34,320         |
| Book Printing              | \$ 4,139          | \$ 3,890          | \$ 3,488          | \$ 3,314          | \$ 4,560          |
| 12 & 12 Book Cost          |                   | \$ -              | \$ 7,500          | \$ 7,125          | \$ 9,300          |
| Additional Book Cost       |                   | \$ -              |                   |                   |                   |

|                                |                        |                             |                        |                                           |                            |
|--------------------------------|------------------------|-----------------------------|------------------------|-------------------------------------------|----------------------------|
| Audio Visual Cost              | \$ 495                 | \$ 367                      | \$ 809                 | \$ 769                                    | \$ 963                     |
| Production Cost                | \$ 765                 | \$ 141                      | \$ 1,618               | \$ 1,537                                  | \$ 1,975                   |
| Shipping & Postage             | \$ 8,469               | \$ 8,452                    | \$ 11,782              | \$ 11,193                                 | \$ 15,228                  |
| Shipping Supplies              | \$ 1,031               | \$ 665                      | \$ 906                 | \$ 861                                    | \$ 2,698                   |
| Reformatting Cost              | \$ -                   | \$ -                        | \$ 1,216               | \$ 1,155                                  | \$ 1,494                   |
| <b>Total CGS</b>               | <b>\$ 35,903</b>       | <b>\$ 31,270</b>            | <b>\$ 46,540</b>       | <b>\$ 44,214</b>                          | <b>\$ 70,538</b>           |
| <b>Gross Profit</b>            | <b>\$ 135,352</b>      | <b>\$ 141,656</b>           | <b>\$ 220,947</b>      | <b>\$ 209,898</b>                         | <b>\$ 286,468</b>          |
| <b>EXPENSES:</b>               | <b>2008<br/>ACTUAL</b> | <b>Projected<br/>ACTUAL</b> | <b>Action<br/>Plan</b> | <b>(05%<br/>Decrease)<br/>Action Plan</b> | <b>Prosperity<br/>Plan</b> |
| <b>Board Administrative:</b>   |                        |                             |                        |                                           |                            |
| Telecommunications             | \$ 1,252               | \$ 925                      | \$ 1,521               | \$ 1,521                                  | \$ 1,521                   |
| Printing & Supplies            | \$ 1,176               | \$ 913                      | \$ 1,947               | \$ 1,947                                  | \$ 1,947                   |
| Postage                        | \$ 1,047               | \$ 888                      | \$ 1,825               | \$ 1,825                                  | \$ 1,825                   |
| Discretionary Fund(GSB)        | \$ 58                  | \$ 134                      | \$ 973                 | \$ 973                                    | \$ 973                     |
| Asst. for GSB Chair            | \$ -                   | \$ -                        | \$ 1,825               | \$ 1,825                                  | \$ 1,825                   |
| <b>Sub-Total</b>               | <b>\$ 3,533</b>        | <b>\$ 2,860</b>             | <b>\$ 8,091</b>        | <b>\$ 8,091</b>                           | <b>\$ 8,091</b>            |
| <b>Board Travel:</b>           |                        |                             |                        |                                           |                            |
| Travel                         | \$ 4,609               | \$ 3,859                    | \$ 7,300               | \$ 7,300                                  | \$ 9,000                   |
| Lodging                        | \$ 7,229               | \$ 6,913                    | \$ 10,341              | \$ 10,341                                 | \$ 12,750                  |
| Per Diem & Meals               | \$ 4,747               | \$ 5,096                    | \$ 6,691               | \$ 6,691                                  | \$ 8,250                   |
| <b>Sub-Total</b>               | <b>\$ 16,585</b>       | <b>\$ 15,868</b>            | <b>\$ 24,332</b>       | <b>\$ 24,332</b>                          | <b>\$ 30,000</b>           |
| <b>Total Board Expenses</b>    | <b>\$ 20,118</b>       | <b>\$ 18,728</b>            | <b>\$ 32,423</b>       | <b>\$ 32,423</b>                          | <b>\$ 38,091</b>           |
| <b>ACM Admin:</b>              |                        |                             |                        |                                           |                            |
| Telecommunications             | \$ -                   | \$ -                        | \$ 456                 | \$ 456                                    | \$ 456                     |
| Printing & Supplies            | \$ -                   | \$ -                        | \$ 584                 | \$ 584                                    | \$ 584                     |
| Postage                        | \$ -                   | \$ -                        | \$ 548                 | \$ 548                                    | \$ 548                     |
| Travel                         | \$ -                   | \$ -                        | \$ -                   | \$ -                                      | \$ -                       |
| Lodging                        | \$ -                   | \$ -                        | \$ -                   | \$ -                                      | \$ -                       |
| Per Diem & Meals               | \$ -                   | \$ -                        | \$ 125                 | \$ 125                                    | \$ 125                     |
| Archives                       | \$ -                   | \$ -                        | \$ 365                 | \$ 365                                    | \$ 365                     |
| <b>Sub-Total</b>               | <b>\$ -</b>            | <b>\$ -</b>                 | <b>\$ 2,078</b>        | <b>\$ 2,078</b>                           | <b>\$ 2,078</b>            |
| <b>General Administrative:</b> |                        |                             |                        |                                           |                            |
| Banking                        | \$ 60                  | \$ 27                       | \$ 122                 | \$ 122                                    | \$ 122                     |
| Insurance                      | \$ 1,832               | \$ 2,393                    | \$ 2,677               | \$ 2,677                                  | \$ 2,800                   |

|                               |                        |                             |                        |                                           |                            |
|-------------------------------|------------------------|-----------------------------|------------------------|-------------------------------------------|----------------------------|
| Professional Fees             | \$ 1,900               | \$ 3,987                    | \$ 1,900               | \$ 1,900                                  | \$ 3,000                   |
| Copyright Reg                 | \$ 500                 | \$ -                        | \$ 500                 | \$ 500                                    | \$ 500                     |
| Trademark Fees                | \$ 1,000               | \$ -                        | \$ -                   | \$ -                                      | \$ -                       |
| Translation Fees              | \$ -                   | \$ -                        | \$ 1,217               | \$ 1,217                                  | \$ 1,217                   |
| Rent & R.E. Tax               | \$ 8,818               | \$ 7,103                    | \$ 11,022              | \$ 11,022                                 | \$ 11,022                  |
| Utilities                     | \$ 670                 | \$ 878                      | \$ 852                 | \$ 852                                    | \$ 852                     |
| Internet/Website              | \$ 1,618               | \$ 505                      | \$ 730                 | \$ 730                                    | \$ 730                     |
| Website Redesign              | \$ -                   | \$ -                        | \$ 7,300               | \$ 7,300                                  | \$ 7,500                   |
| Website Producer              | \$ -                   | \$ -                        | \$ 8,516               | \$ 8,516                                  | \$ 9,000                   |
| Website Hosting               | \$ -                   | \$ -                        | \$ 730                 | \$ 730                                    | \$ 900                     |
| Database Mgmt                 | \$ 3,360               | \$ 498                      | \$ 1,217               | \$ 1,217                                  | \$ 7,500                   |
| Domain Name Renewal           | \$ -                   | \$ -                        | \$ -                   | \$ -                                      | \$ -                       |
| Outreach to Professional      | \$ -                   | \$ -                        | \$ 4,864               | \$ 4,864                                  | \$ 6,000                   |
| Miscellaneous                 | \$ 758                 | \$ 51                       | \$ 608                 | \$ 608                                    | \$ 750                     |
| <b>Sub-Total</b>              | <b>\$ 20,516</b>       | <b>\$ 15,442</b>            | <b>\$ 42,255</b>       | <b>\$ 42,255</b>                          | <b>\$ 51,893</b>           |
|                               | <b>2008<br/>ACTUAL</b> | <b>Projected<br/>ACTUAL</b> | <b>Action<br/>Plan</b> | <b>(05%<br/>Decrease)<br/>Action Plan</b> | <b>Prosperity<br/>Plan</b> |
| <b>Office Administrative:</b> |                        |                             |                        |                                           |                            |
| Contracted Services           | \$ 2,033               | \$ 870                      | \$ 4,865               | \$ 4,865                                  | \$ 5,000                   |
| W&M Graphic Designer          | \$ -                   | \$ -                        | \$ 3,650               | \$ 3,650                                  | \$ 5,000                   |
| DA Focus Designer             | \$ -                   | \$ -                        | \$ 3,650               | \$ 3,650                                  | \$ 4,000                   |
| Postage                       | \$ 1,160               | \$ 1,108                    | \$ 1,460               | \$ 1,460                                  | \$ 1,680                   |
| Printing                      | \$ 155                 | \$ 1,524                    | \$ 1,825               | \$ 1,825                                  | \$ 1,825                   |
| Office Sup & Expense          | \$ 1,713               | \$ 1,233                    | \$ 1,521               | \$ 1,521                                  | \$ 2,000                   |
| Volunteer Supplies            |                        |                             | \$ 544                 | \$ 544                                    | \$ 544                     |
| Telecommunications            | \$ 1,774               | \$ 1,861                    | \$ 2,190               | \$ 2,190                                  | \$ 2,190                   |
| Archives:                     |                        |                             |                        |                                           |                            |
| Filing/Equip/Supplies         | \$ 36                  | \$ 92                       | \$ 365                 | \$ 365                                    | \$ 600                     |
| Shipping                      | \$ -                   | \$ 145                      | \$ 122                 | \$ 122                                    | \$ 200                     |
| Storage Unit                  | \$ 640                 | \$ 918                      | \$ 1,217               | \$ 1,217                                  | \$ 1,217                   |
| Archive ACM Phone             | \$ -                   | \$ -                        | \$ 61                  | \$ 61                                     | \$ 100                     |
| MyDocs Online                 | \$ -                   | \$ -                        | \$ 304                 | \$ 304                                    | \$ 456                     |
| GotVmail 800 Number           | \$ -                   | \$ 745                      | \$ 912                 | \$ 912                                    | \$ 912                     |
| Mosy.com Storage              | \$ -                   | \$ -                        | \$ 122                 | \$ 122                                    | \$ 365                     |
| Small Equip(Sec 179 ded)      | \$ -                   | \$ -                        | \$ 1,216               | \$ 1,216                                  | \$ 1,216                   |
| <b>Sub-Total</b>              | <b>\$ 7,511</b>        | <b>\$ 8,496</b>             | <b>\$ 24,024</b>       | <b>\$ 24,024</b>                          | <b>\$ 27,305</b>           |
|                               |                        |                             |                        |                                           |                            |
| <b>Payroll Expense</b>        | <b>\$ 53,336</b>       | <b>\$ 56,351</b>            | <b>\$ 99,348</b>       | <b>\$ 99,348</b>                          | <b>\$ 107,000</b>          |

|                                                |                   |                   |                   |                   |                   |
|------------------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| <b><u>Other Related Expenses</u></b>           |                   |                   |                   |                   |                   |
| J.H. Scholarship Fnd Dist                      | \$ 4,230          | \$ 2,161          | \$ 8,515          | \$ 8,515          | \$ 8,600          |
| WSC Misc. Expenses                             | \$ 2,328          | \$ 2,328          | \$ 3,042          | \$ 3,042          | \$ 3,042          |
| WSC Committee Expenses                         | \$ 1,429          | \$ 3,666          | \$ 7,200          | \$ 7,200          | \$ 7,500          |
| <b>Tot. Otr Related Expenses</b>               | <b>\$ 7,987</b>   | <b>\$ 8,155</b>   | <b>\$ 18,757</b>  | <b>\$ 18,757</b>  | <b>\$ 19,142</b>  |
|                                                |                   |                   |                   |                   |                   |
| <b>Total Expenses</b>                          | <b>\$ 109,468</b> | <b>\$ 107,172</b> | <b>\$ 218,885</b> | <b>\$ 218,885</b> | <b>\$ 245,509</b> |
|                                                |                   |                   |                   |                   |                   |
| <b>SURPLUS (Deficit)<br/>FROM OPERATIONS</b>   | <b>\$ 25,884</b>  | <b>\$ 34,484</b>  | <b>\$ 2,062</b>   | <b>\$ (8,987)</b> | <b>\$ 40,959</b>  |
|                                                |                   |                   |                   |                   |                   |
| <b><u>Other Revenue &amp;<br/>Expenses</u></b> |                   |                   |                   |                   |                   |
| Funds Transferred from                         |                   |                   |                   |                   |                   |
| Savings Account                                | \$ -              | \$ -              | \$ -              | \$ 8,987          | \$ -              |
| <b>Sub-Total</b>                               | <b>\$ -</b>       | <b>\$ -</b>       | <b>\$ -</b>       | <b>\$ 8,987</b>   | <b>\$ -</b>       |
|                                                |                   |                   |                   |                   |                   |
| <b>SURPLUS(Deficit)</b>                        | <b>\$ 25,884</b>  | <b>\$ 34,484</b>  | <b>\$ 2,062</b>   | <b>\$ (0)</b>     | <b>\$ 40,959</b>  |

Unaudited—For information only

## Notes to 2009 Debtors Anonymous General Service Board 5-Year Plan

### **INCOME**

**Column (A)- 2007-2008 ACTUAL PLAN.** This Plan represents the Actual Income and Expenses for year beginning July 01, 2007 ended June 30, 2008.

**Column (B)- 2008-2009 PROJECTED ACTUAL PLAN.** This statement reflects the estimated income and expenses based on 9 months of data.

### **Column (C) 2009-2014 ACTION PLAN FINANCES.**

1. Group Contributions: We hope that the action set forth in the Action Plan will produce an approximate 26.5% increase in Group Contributions.
2. Individual Contributions: We hope that the action set forth in the Action Plan will produce an approximate 60.0% increase in Individual Contributions.
3. Other Contributions: We hope that the efforts of the RDC Committee will produce this outcome.
4. Other income producing items:
  - a. Interest Income: We made the best estimate we could in this fluctuating economy.
  - b. Currency of Hope: We estimate Sales will decline with the introduction of the 12 & 12 book.
  - c. Pamphlet Sales: Should show a slight increase with the Spanish translation.
  - d. 12 & 12 Recovery Book: These sales numbers are based on the sale of COH and the requests from the fellowship for this book.
  - e. Shipping Receipts: These receipts should increase with the increase with sale of literature.
  - f. Other Sales & Misc. Income: Should increase in the same proportion as other sales.
  - g. John Henderson Fund: Based on 2008 contributions.
  - h. WSC Net Income: Based on 2008 Income.
5. Cost of Goods Sold: The cost of goods sold is a variable and varies with sale of literature. We used the ratio of sales to cost to estimate these costs.

### **EXPENSES**

1. Board Expenses: The Board expenses were estimated based on 2008 expenses and adjusted for inflation at the rate of 4.0% for 5 years. Note: Board expenses were projected for 15 Trustees.
2. ACM Administration Expenses: Projected for 5 ACMs based on 30% of 5 GSB Administrative cost adjusted for 4.0% inflation.
3. General Administrative Expenses:
  - a. Insurance: Allocated an additional \$800 in case we have a change in needs or premiums.

- b. Professional Fees: Addresses the need to be able to acquire more assistance from professionals.
  - c. Copyrights Registration: Addresses the need for additional copyrights if necessary.
  - d. Translation Fees: Addresses our needs if we need additional translations.
  - e. Rent & Utilities: These costs were adjusted for an inflation rate of 4.0% over the next 5 years.
  - f. Web site redesign, producer, hosting, database management, outreach to professionals: These funds address our need to be able to acquire assistance from professionals.
  - g. The other General Administrative expenses: These costs were adjusted for an inflation rate of 4.0% over the next 5 years.
4. Office Administrative Expenses:
- a. Contracted Services, W&M Graphic Designer, DA Focus Designer: These funds addresses our needs to be able to acquire assistance from professionals.
  - b. Archives Expenses: We expect these costs to double over their base year.
  - c. Archive Storage: Expect to increase by 50% because of increase storage needs.
  - d. GotVmail 800 Number: Expect to increase because of increase uses.
  - e. Small Equip (Sec 179): Expect to increase by 50% because of increase because of additional equipment for new employees.
  - f. All other Office Administrative Expenses have been adjusted for 4.0% inflation for the next 5 years.
5. Payroll Expenses: We projected cost to include another full-time employee with a base rate of \$20.00 per hour for a 40.0 hour week.
6. Other Related Expenses have been adjusted for 4.0% inflation for the next 5 years.

#### **Column (D) 2009-2014 ACTION PLAN FINANCES (5.0%) Decrease in Income.**

Note: This plan is the same as the above except the Income and Cost of Goods have been reduced by 5.0%. The Operating Expenses remained the same because these expenses are fixed. We chose to reflect a 5.0% decrease because in looking back over the past five years, our income has not declined. In fact, it has increased 23.8 %. If we do have a 5.0% decline of (\$8,987) we would have approximately \$71, 433 Unrestricted Savings to draw from. Please note also if we have to address an Office move after our lease runs out, we will still have those savings to draw from.

#### **Column (E) 2009-2014 PROSPERITY PLAN**

This plan is what we would like our finances to look like in five years. It is our dream for our fellowship. If we take the actions outlined in this Five-Year Plan, this is where we hope we will be in five years.

## **CONCLUSION**

The Five-Year Plan offers an opportunity to review the state of the DA Fellowship and the option to undertake the changes necessary for a dynamic DA community.

There is much to cause concern.

- In the last 10 years we see no significant increase in the number of registered DA meetings.
- We have evidence of a surprising lack of consensus even at the GSR level as to what constitutes debting and not debting. Even more alarming is the apparent lack of agreement on part of DA's primary purpose of "not debting one day at a time."
- There seems to be an overemphasis on mastering the Tools of DA as opposed to working the Twelve Steps. As stated in the *Spirituality* pamphlet, "for many of us, using the Tools of DA brought almost immediate relief. The pressure of our financial situation eased. We felt hope for the first time, the hope that things might be different for us in DA, that we might eventually pay off our creditors and learn to live an abundant joyful life. For a short period of time, there was enough. While the Tools gave us relief, however, we found that only by working the Twelve Steps were we able to begin to experience recovery."
- After 33 years, we are unable to create a regional structure or in fact fill many of the program service positions, from the smallest of DA meetings to a Board three short of the necessary membership.
- Fifty percent of our registered DA groups are unable or unwilling to contribute to world level service, making it difficult to fund necessary and desired projects.
- If we as a Fellowship cannot or will not focus on our primary spiritual purpose, we like the individual DA member or DA group, will experience continued stagnation, loss of members, and an ongoing lack of service and support. Our shared recovery is too important to allow this to happen.

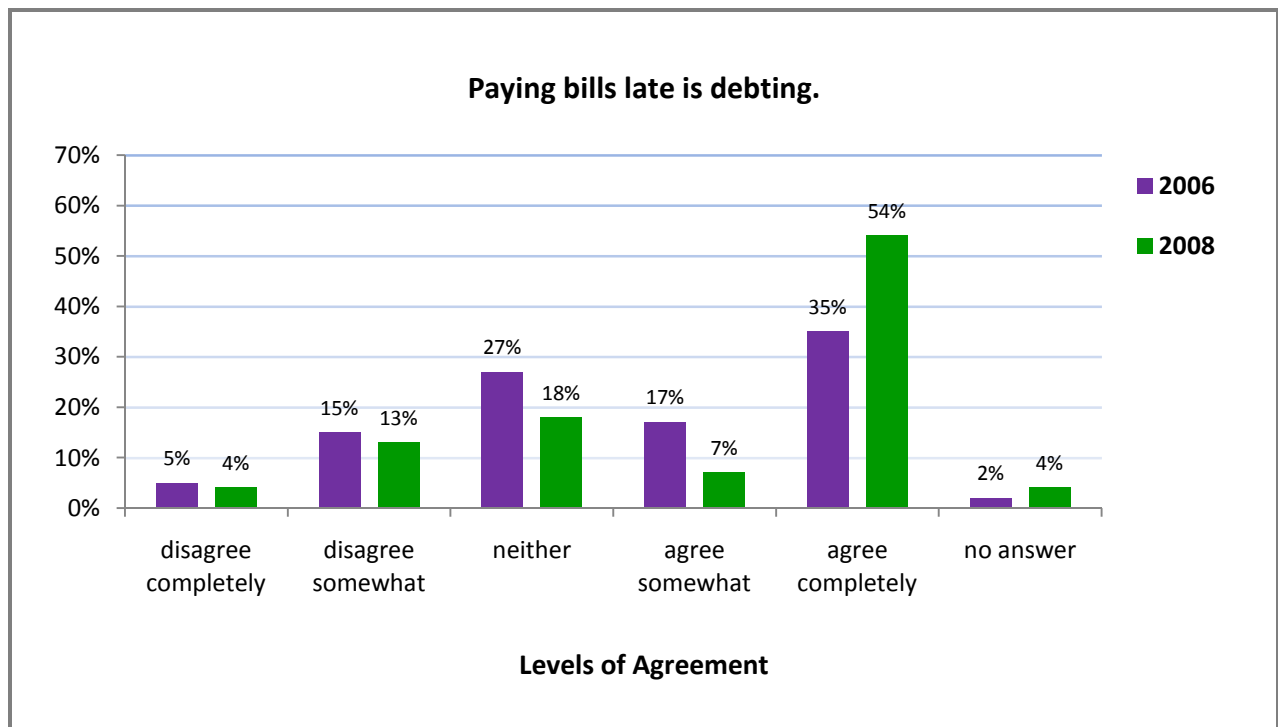
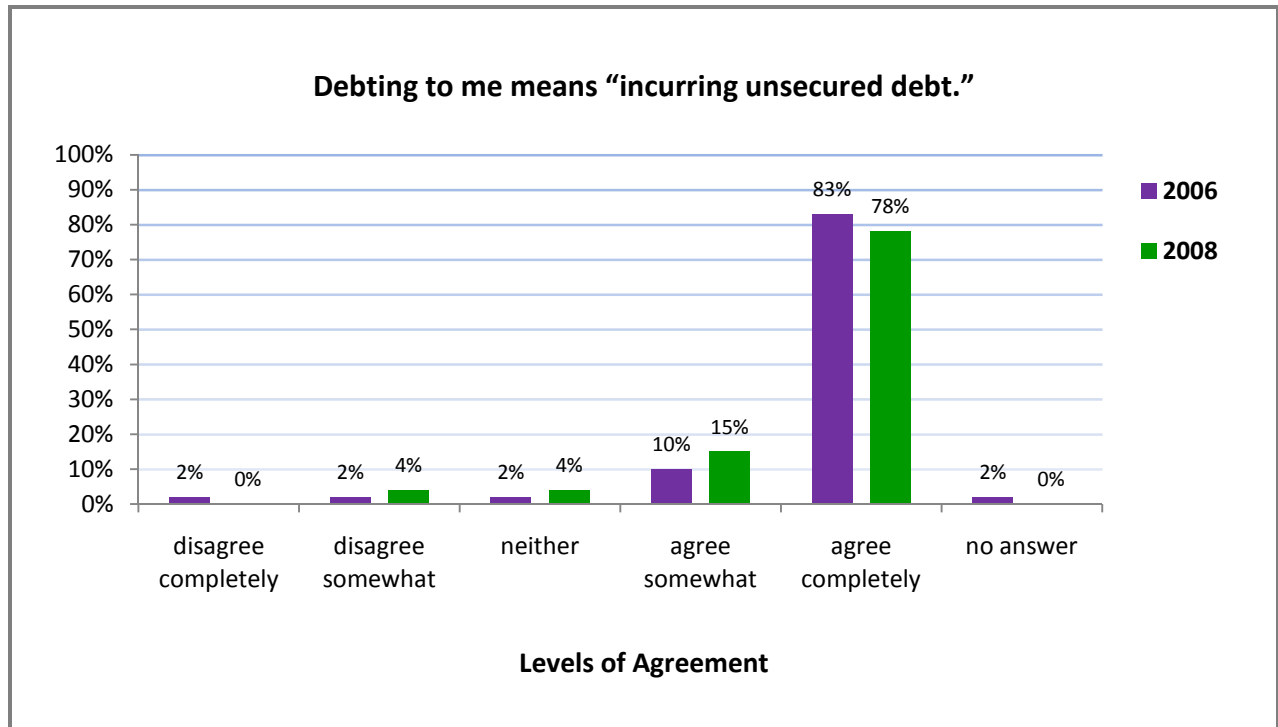
However, as illustrated by the following, there is much to inspire the Fellowship of Debtors Anonymous:

- A successful 33-year-old Twelve Step program offering recovery from the disease of compulsive debting.

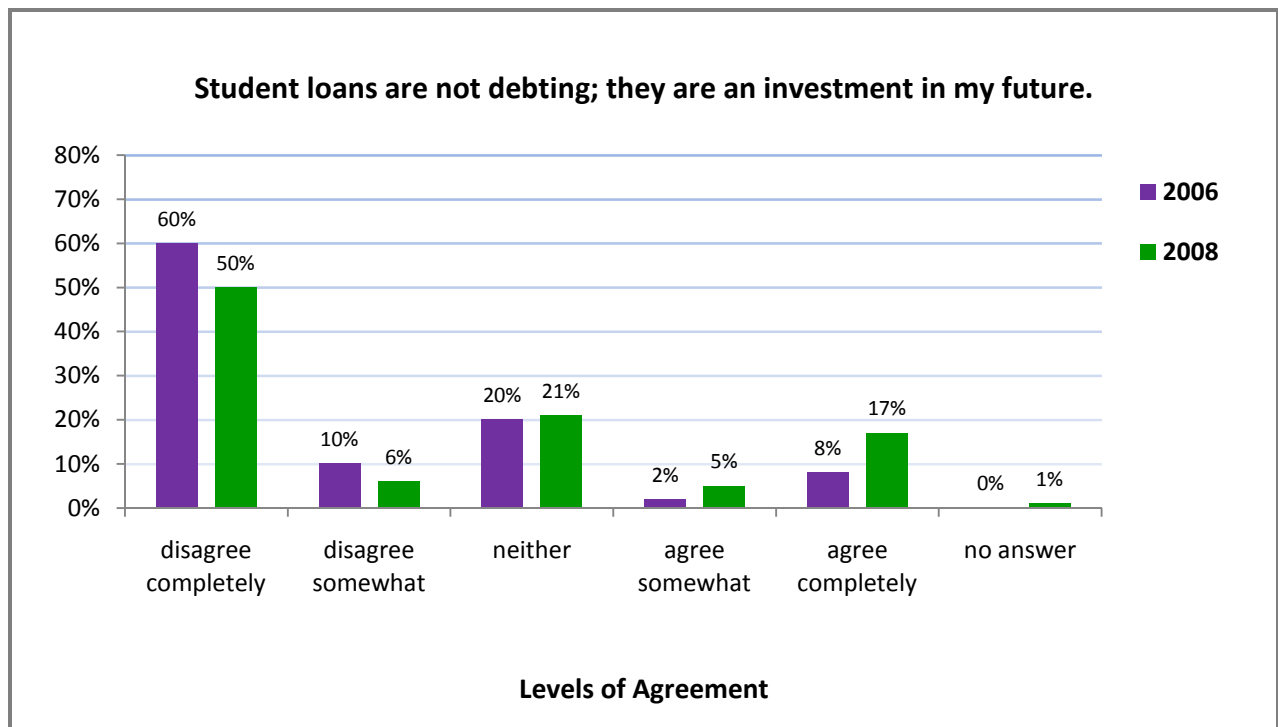
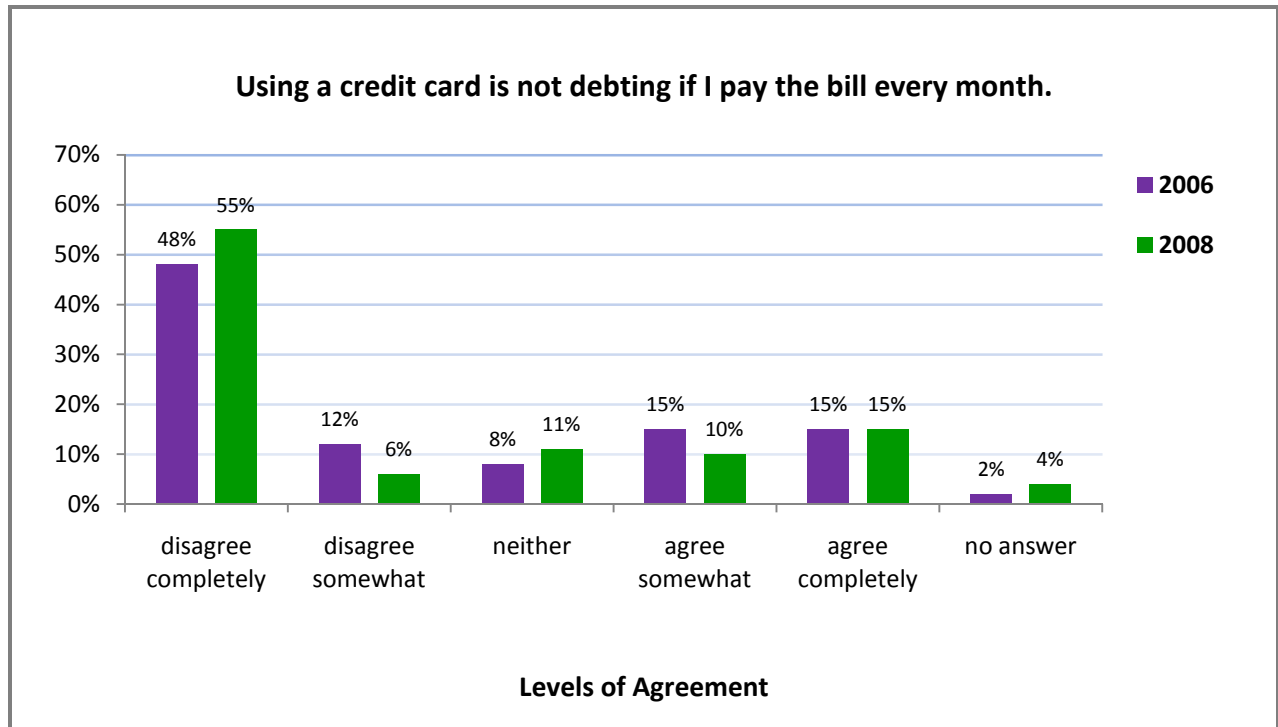
- A worldwide Fellowship of approximately 500 groups with many members willing to contribute and serve.
- An abundance of literature, including our first *Twelve Step of Debtors Anonymous* pamphlet, *A Currency of Hope*, and the many pamphlets which offer experience, strength, and hope to the still-suffering debtor. A writer for the upcoming *DA Twelve Steps and Twelve Traditions* book.
- The beginnings of translation of DA literature into different languages.
- A stable Fellowship office staffed by a long-term paid employee.
- A growing web presence to serve the new and long-term member; Internet and telephone meetings for isolated and disabled members.
- A financial reserve for literature publications, seed money for the next WSC, and a prudent reserve of approximately six months of operating expenses.
- A small but dedicated group of Trustees willing to work to help the DA Fellowship.

We find ourselves at an interesting juncture on this DA journey. We know that all genuine recovery comes from working the Twelve Steps of Debtors Anonymous, which promise “Having had a spiritual awakening as the result of these steps, we tried to carry this message to compulsive debtors, and to practice these principles in all our affairs.” Anyone who has thoroughly worked these Twelve Steps will be compelled by that spiritual development to be of service to the debtor who still suffers. Therefore, we suggest that part of any long-range plan for this spiritual Fellowship include a return to and an intensive focus on DA's primary purpose to stop debting one day at time and to help other compulsive debtors to stop incurring unsecured debt .

Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison



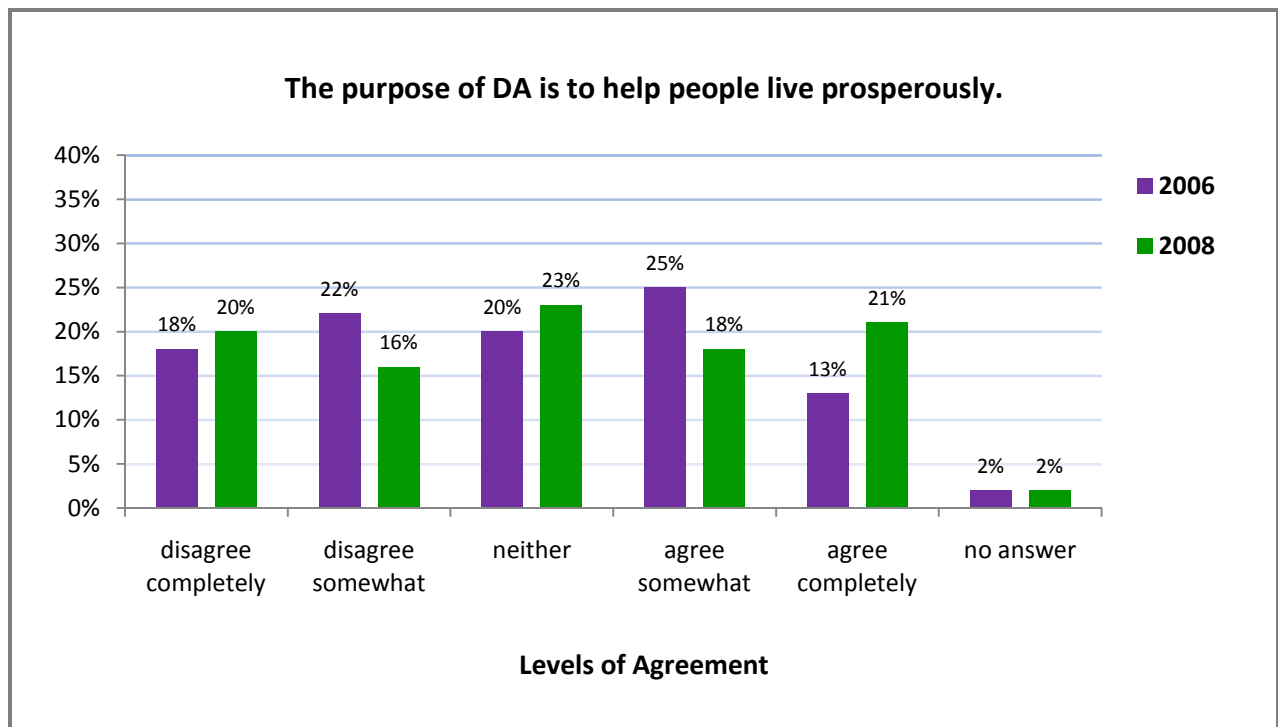
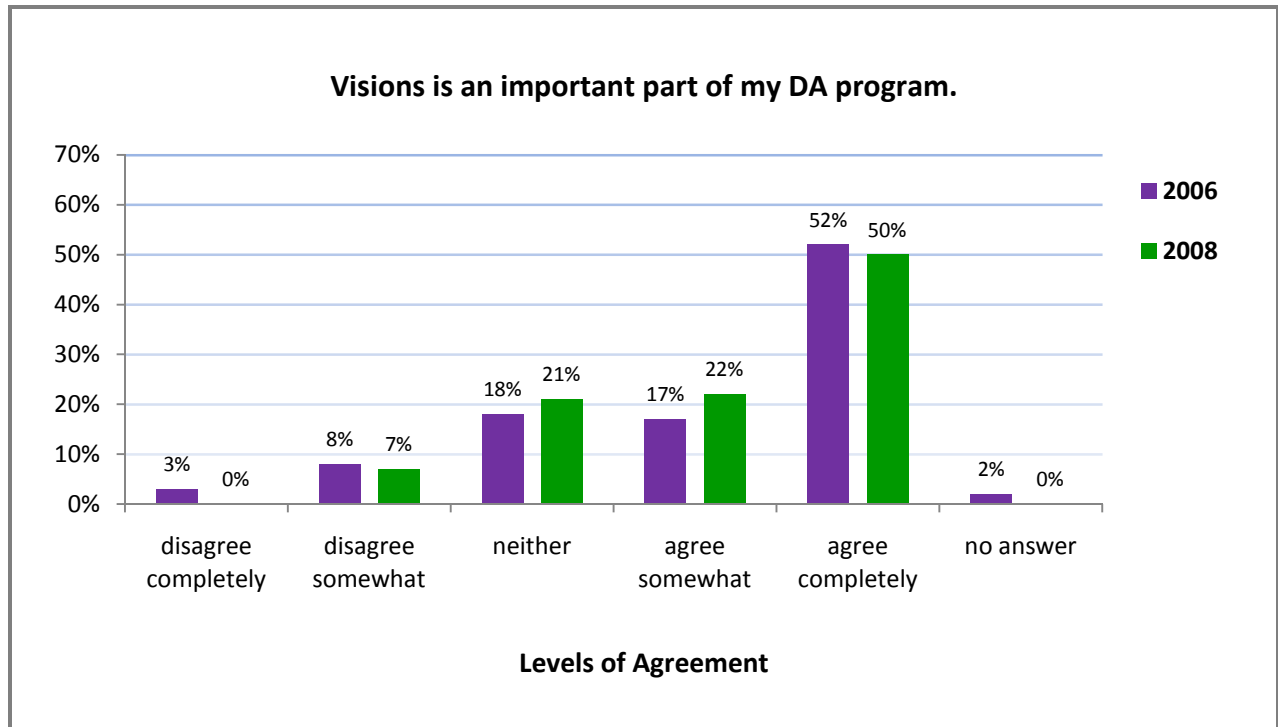
Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison



# Appendix

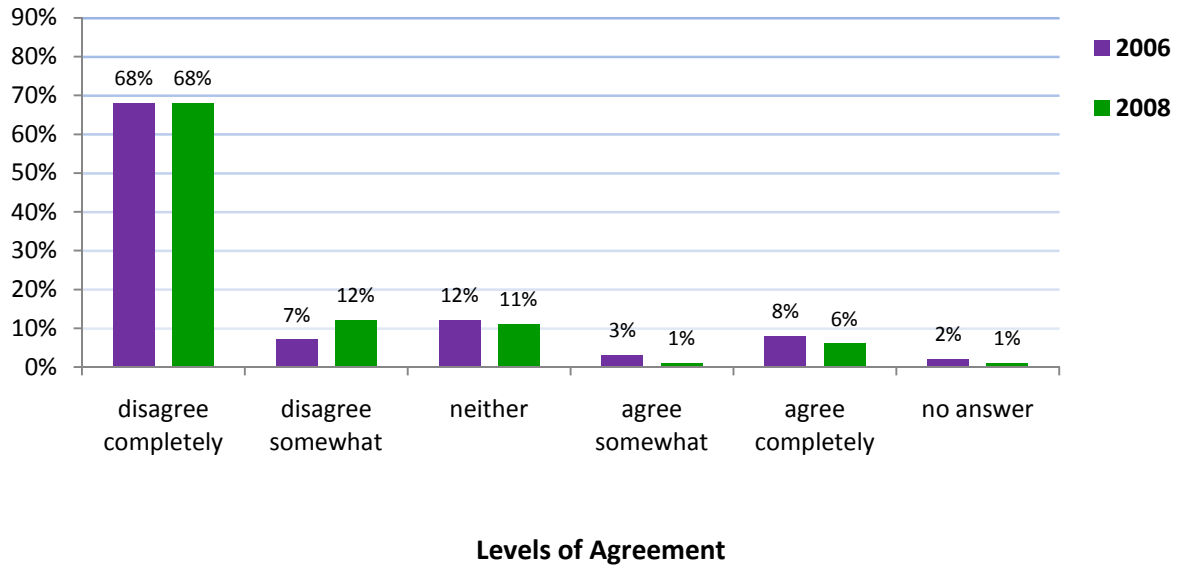
## DA's Primary Purpose Survey

### 2006 & 2008 Comparison

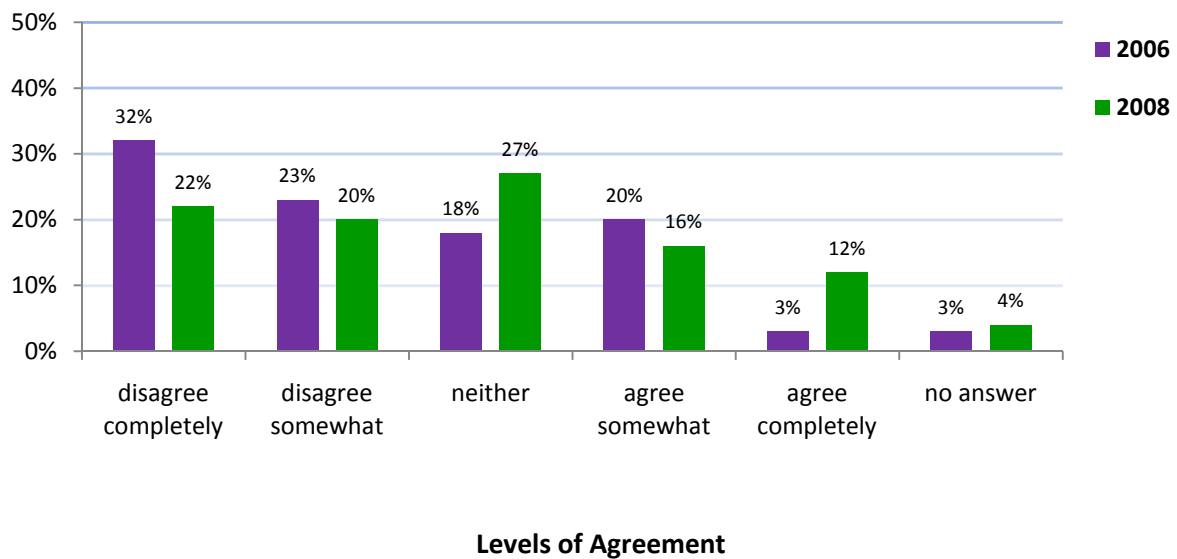


Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison

**Compulsive spending and underearning should not be part of the DA program.**

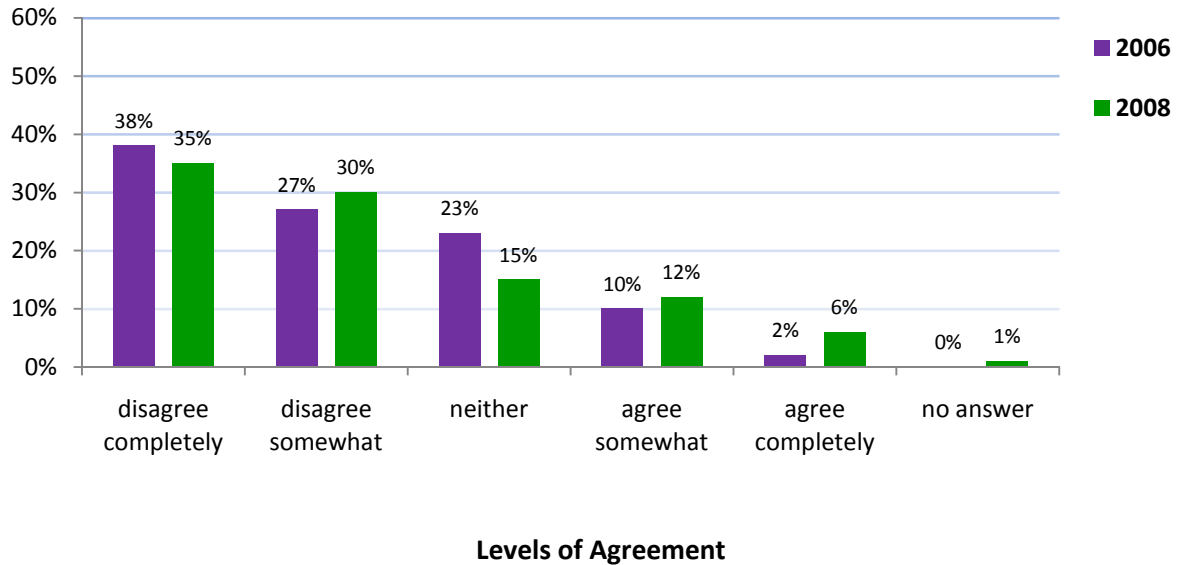


**DA does not do a good job of addressing the needs of underearners.**

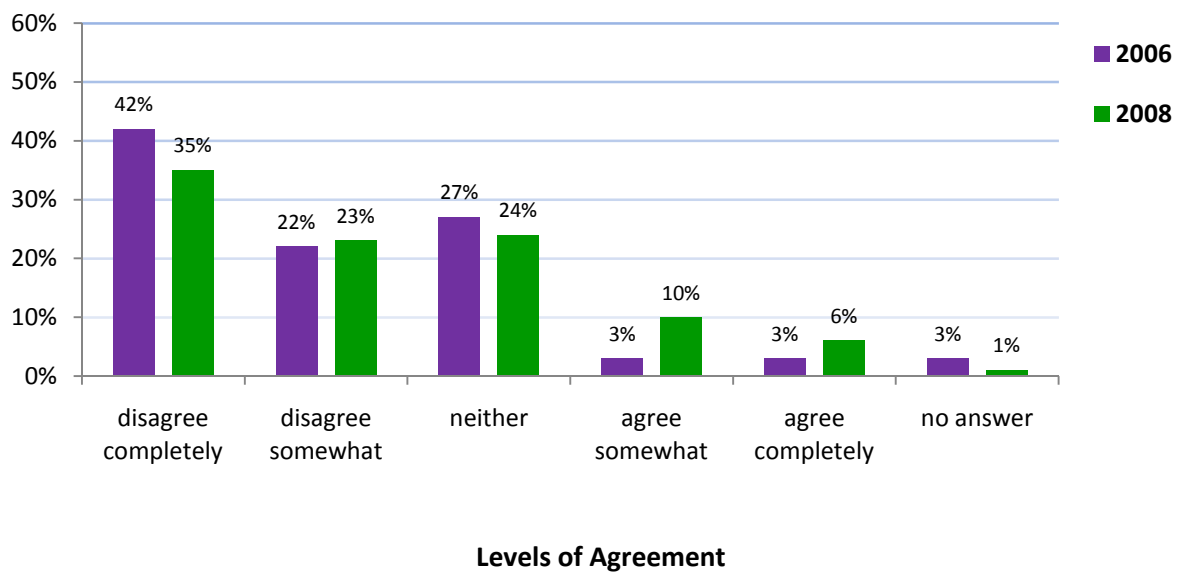


Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison

**DA does not do a good job of addressing the needs of compulsive spenders.**



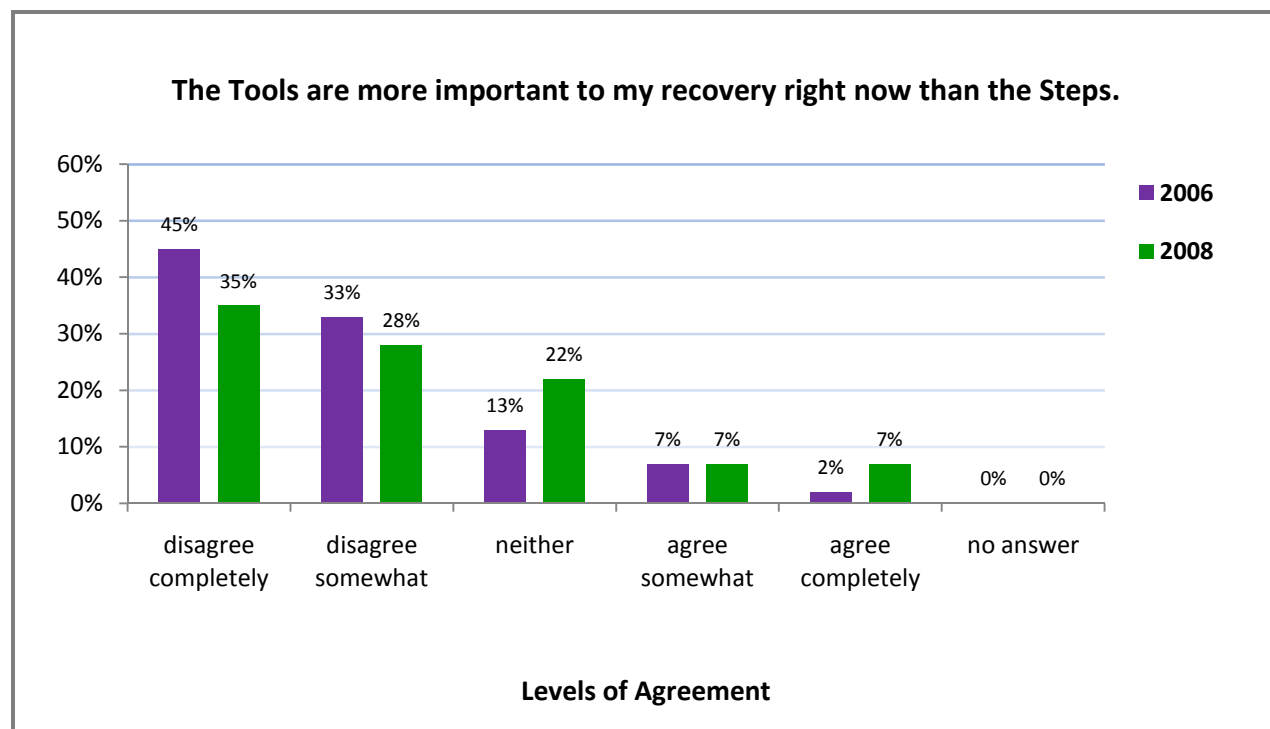
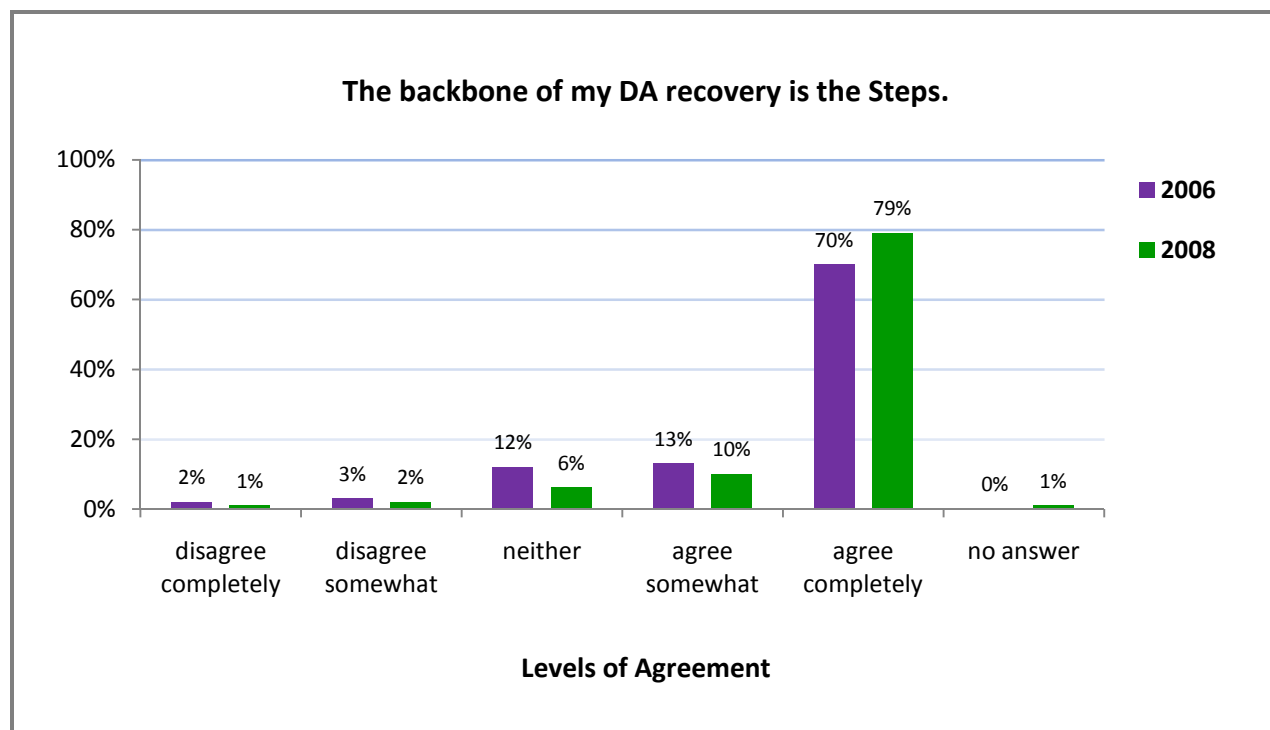
**DA should focus less on debting and more on prosperity.**



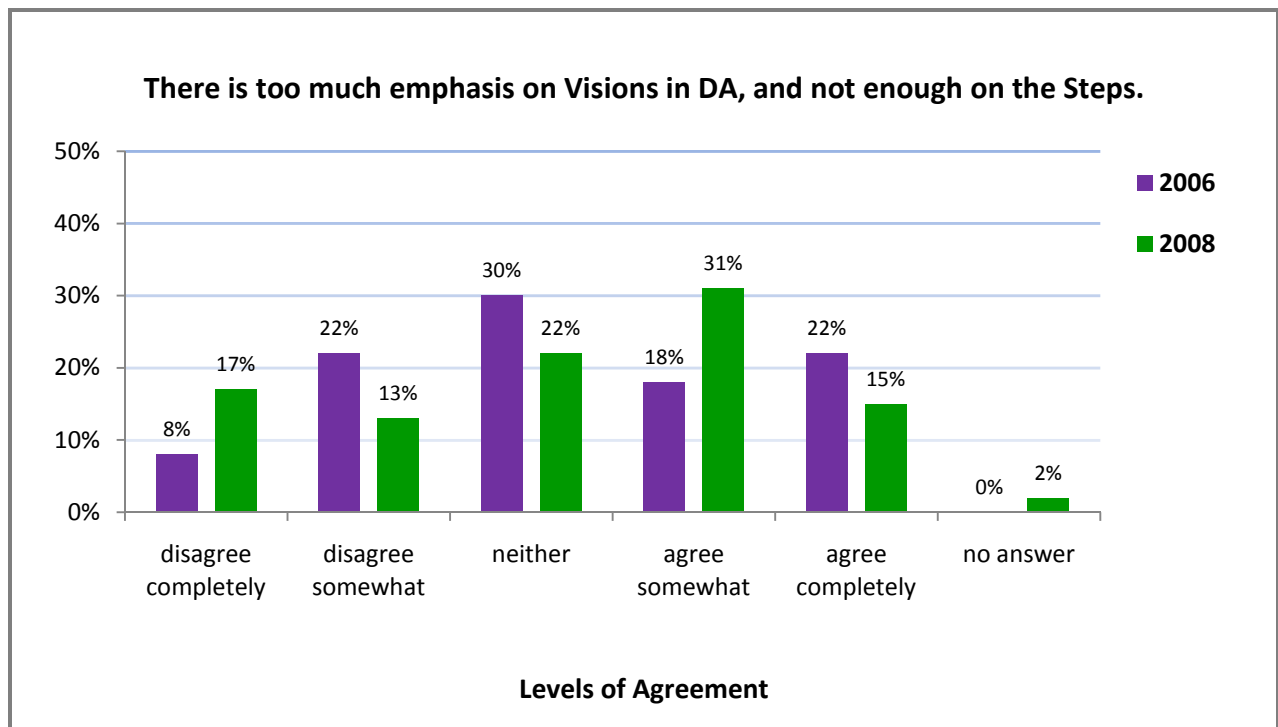
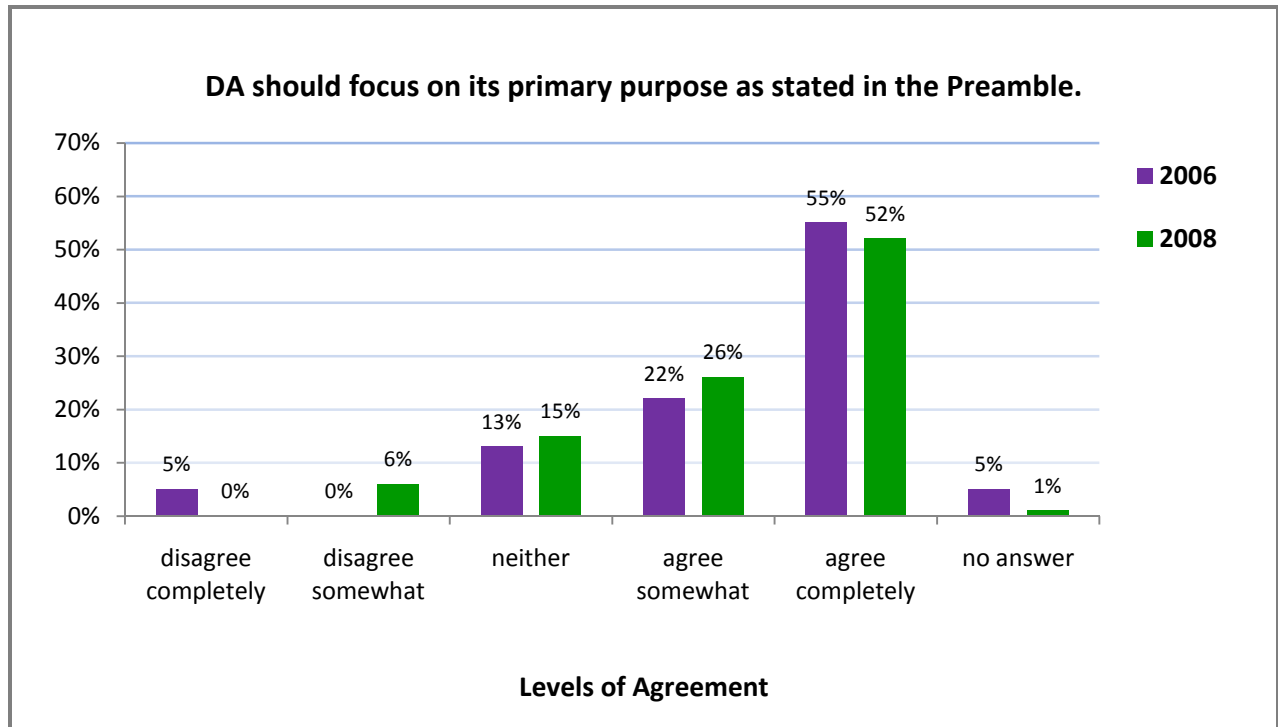
# Appendix

## DA's Primary Purpose Survey

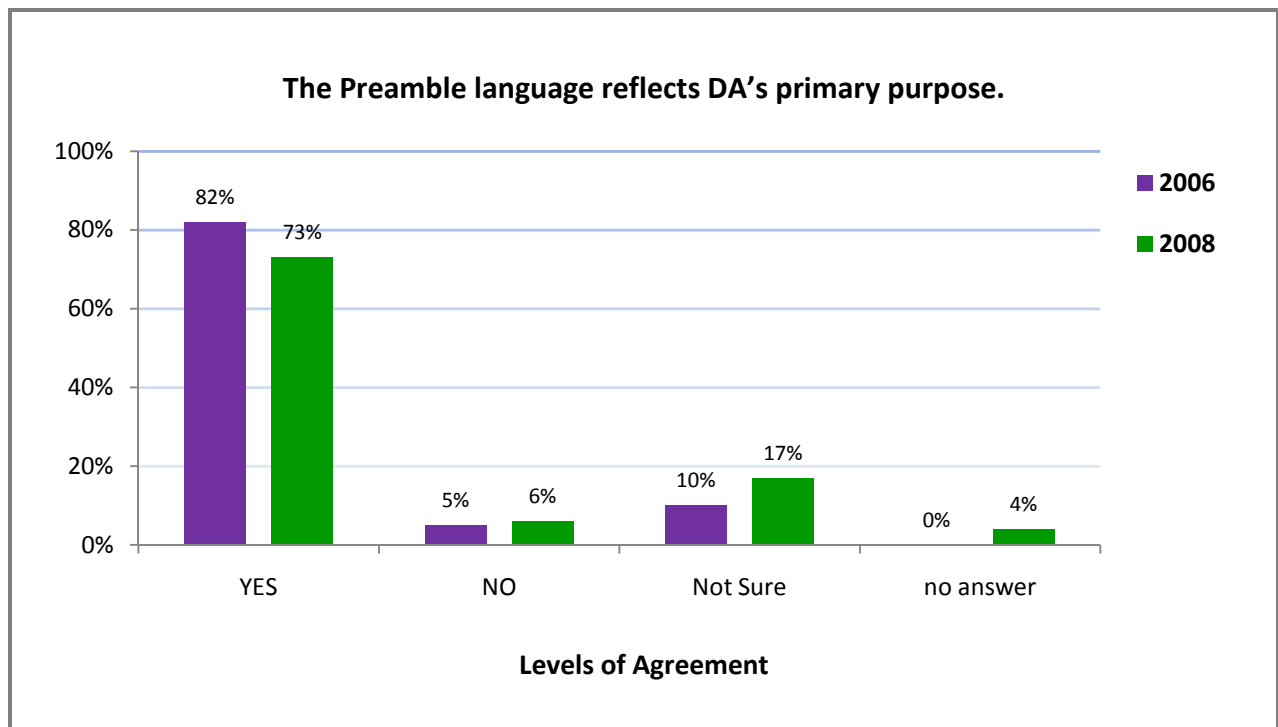
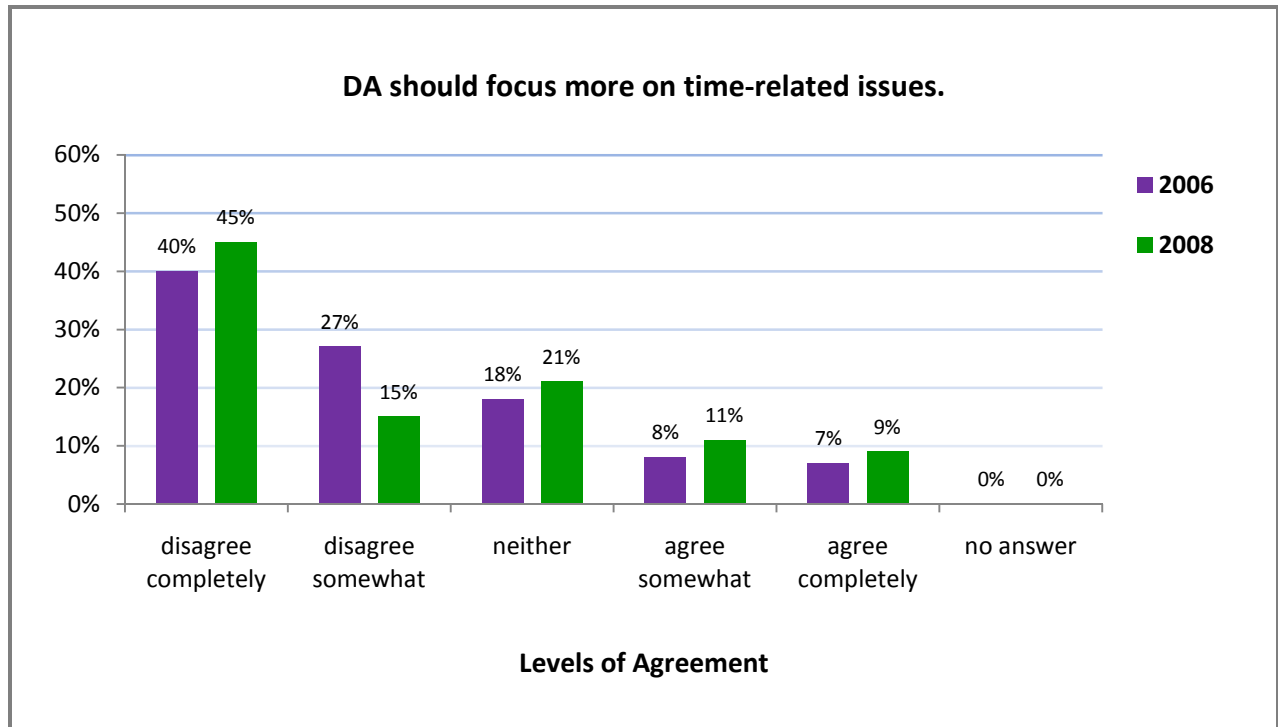
### 2006 & 2008 Comparison



Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison



Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison



# Appendix

## DA's Primary Purpose Survey

### 2006 & 2008 Comparison

#### 2008 Survey Results

(Note: percentages may not add to 100% due to rounding)

| Q1 | Debting to me means<br>"incurring unsecured debt." | #  | %   | Q2 | Paying bills late is debting. | #  | %   |
|----|----------------------------------------------------|----|-----|----|-------------------------------|----|-----|
| 1  | disagree completely                                | 0  | 0   | 1  | disagree completely           | 3  | 4   |
| 2  | disagree somewhat                                  | 3  | 4   | 2  | disagree somewhat             | 11 | 13  |
| 3  | neither                                            | 3  | 4   | 3  | neither                       | 15 | 18  |
| 4  | agree somewhat                                     | 12 | 15  | 4  | agree somewhat                | 6  | 7   |
| 5  | agree completely                                   | 64 | 78  | 5  | agree completely              | 44 | 54  |
| X  | no answer                                          | 0  | 0   | X  | no answer                     | 3  | 4   |
|    | Total                                              | 82 | 101 |    | Total                         | 82 | 100 |

| Q3 | Using a credit card is not<br>debting if I pay the bill<br>every month. | #  | %   | Q4 | Student loans are not<br>debting; they are an<br>investment in my future. | #  | %   |
|----|-------------------------------------------------------------------------|----|-----|----|---------------------------------------------------------------------------|----|-----|
| 1  | disagree completely                                                     | 45 | 55  | 1  | disagree completely                                                       | 41 | 50  |
| 2  | disagree somewhat                                                       | 5  | 6   | 2  | disagree somewhat                                                         | 5  | 6   |
| 3  | neither                                                                 | 9  | 11  | 3  | neither                                                                   | 17 | 21  |
| 4  | agree somewhat                                                          | 8  | 10  | 4  | agree somewhat                                                            | 4  | 5   |
| 5  | agree completely                                                        | 12 | 15  | 5  | agree completely                                                          | 14 | 17  |
| X  | no answer                                                               | 3  | 4   | X  | no answer                                                                 | 1  | 1   |
|    | Total                                                                   | 82 | 101 |    | Total                                                                     | 82 | 100 |

Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison

| Q5 | Visions is an important part of my DA program. | #  | %   | Q6 | The purpose of DA is to help people live prosperously. | #  | %   |
|----|------------------------------------------------|----|-----|----|--------------------------------------------------------|----|-----|
| 1  | disagree completely                            | 0  | 0   | 1  | disagree completely                                    | 16 | 20  |
| 2  | disagree somewhat                              | 6  | 7   | 2  | disagree somewhat                                      | 13 | 16  |
| 3  | neither                                        | 17 | 21  | 3  | neither                                                | 19 | 23  |
| 4  | agree somewhat                                 | 18 | 22  | 4  | agree somewhat                                         | 15 | 18  |
| 5  | agree completely                               | 41 | 50  | 5  | agree completely                                       | 17 | 21  |
| X  | no answer                                      | 0  | 0   | X  | no answer                                              | 2  | 2   |
|    | Total                                          | 82 | 100 |    | Total                                                  | 82 | 101 |

| Q7 | Compulsive spending and underearning should not be part of the DA program. | #  | %  | Q8 | DA does not do a good job of addressing the needs of underearners. | #  | %   |
|----|----------------------------------------------------------------------------|----|----|----|--------------------------------------------------------------------|----|-----|
| 1  | disagree completely                                                        | 56 | 68 | 1  | disagree completely                                                | 18 | 22  |
| 2  | disagree somewhat                                                          | 10 | 12 | 2  | disagree somewhat                                                  | 16 | 20  |
| 3  | neither                                                                    | 9  | 11 | 3  | neither                                                            | 22 | 27  |
| 4  | agree somewhat                                                             | 1  | 1  | 4  | agree somewhat                                                     | 13 | 16  |
| 5  | agree completely                                                           | 5  | 6  | 5  | agree completely                                                   | 10 | 12  |
| X  | no answer                                                                  | 1  | 1  | X  | no answer                                                          | 3  | 4   |
|    | Total                                                                      | 82 | 99 |    | Total                                                              | 82 | 101 |

Appendix  
DA's Primary Purpose Survey  
2006 & 2008 Comparison

| Q9 | DA does not do a good job of addressing the needs of compulsive spenders. | #  | %  | Q10 | DA should focus less on debting and more on prosperity. | #  | %  |
|----|---------------------------------------------------------------------------|----|----|-----|---------------------------------------------------------|----|----|
| 1  | disagree completely                                                       | 29 | 35 | 1   | disagree completely                                     | 29 | 35 |
| 2  | disagree somewhat                                                         | 25 | 30 | 2   | disagree somewhat                                       | 19 | 23 |
| 3  | neither                                                                   | 12 | 15 | 3   | neither                                                 | 20 | 24 |
| 4  | agree somewhat                                                            | 10 | 12 | 4   | agree somewhat                                          | 8  | 10 |
| 5  | agree completely                                                          | 5  | 6  | 5   | agree completely                                        | 5  | 6  |
| X  | no answer                                                                 | 1  | 1  | X   | no answer                                               | 1  | 1  |
|    | Total                                                                     | 82 | 99 |     | Total                                                   | 82 | 99 |

| Q11 | The backbone of my DA recovery is the Steps. | #  | %  | Q12 | The Tools are more important to my recovery right now than the Steps. | #  | %  |
|-----|----------------------------------------------|----|----|-----|-----------------------------------------------------------------------|----|----|
| 1   | disagree completely                          | 1  | 1  | 1   | disagree completely                                                   | 29 | 35 |
| 2   | disagree somewhat                            | 2  | 2  | 2   | disagree somewhat                                                     | 23 | 28 |
| 3   | neither                                      | 5  | 6  | 3   | neither                                                               | 18 | 22 |
| 4   | agree somewhat                               | 8  | 10 | 4   | agree somewhat                                                        | 6  | 7  |
| 5   | agree completely                             | 65 | 79 | 5   | agree completely                                                      | 6  | 7  |
| X   | no answer                                    | 1  | 1  | X   | no answer                                                             | 0  | 0  |
|     | Total                                        | 82 | 99 |     | Total                                                                 | 82 | 99 |

Appendix  
DA's Primary Purpose Survey  
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| Q13 | DA should focus on its primary purpose as stated in the Preamble. | #  | %   | Q14 | There is too much emphasis on Visions in DA, and not enough on the Steps. | #  | %   |
|-----|-------------------------------------------------------------------|----|-----|-----|---------------------------------------------------------------------------|----|-----|
| 1   | disagree completely                                               | 0  | 0   | 1   | disagree completely                                                       | 14 | 17  |
| 2   | disagree somewhat                                                 | 5  | 6   | 2   | disagree somewhat                                                         | 11 | 13  |
| 3   | neither                                                           | 12 | 15  | 3   | neither                                                                   | 18 | 22  |
| 4   | agree somewhat                                                    | 21 | 26  | 4   | agree somewhat                                                            | 25 | 31  |
| 5   | agree completely                                                  | 43 | 52  | 5   | agree completely                                                          | 12 | 15  |
| X   | no answer                                                         | 1  | 1   | X   | no answer                                                                 | 2  | 2   |
|     | Total                                                             | 82 | 100 |     | Total                                                                     | 82 | 100 |

| Q15 | DA should focus more on time-related issues. | #  | %   | Q16 | The Preamble language reflects DA's primary purpose. | #  | %   |
|-----|----------------------------------------------|----|-----|-----|------------------------------------------------------|----|-----|
| 1   | disagree completely                          | 37 | 45  | Y   | yes                                                  | 60 | 73  |
| 2   | disagree somewhat                            | 12 | 15  | N   | no                                                   | 5  | 6   |
| 3   | neither                                      | 17 | 21  | NS  | not sure                                             | 14 | 17  |
| 4   | agree somewhat                               | 9  | 11  | X   | no answer                                            | 3  | 4   |
| 5   | agree completely                             | 7  | 9   |     |                                                      |    |     |
| X   | no answer                                    | 0  | 0   |     |                                                      |    |     |
|     | Total                                        | 82 | 101 |     | Total                                                | 82 | 100 |