

Knowledge-Based Decision Making Posting and Archiving Financial Statements Online

Topic for Discussion

Should treasurer's reports and budgets be posted on the state website?

Framing

Assembly officers are reviewing many of Assembly's processes, including dissemination of financial reports.

Reasons for posting treasurer's reports and budgets online include the following:

- Accessibility of documents for all members and groups
- Transparency and accountability
- Reduction of printing costs

Background

The current procedure for distributing treasurer's reports and budgets is as follows:

- The Treasurer and Budget and Finance Coordinator prepare their reports and make at least 60 paper copies to hand out at Assembly. Sixty copies of three pages at \$0.13 per page costs \$23.
- They distribute the paper copies to AWSC members and GRs who attend Assembly.
- They archive copies of the reports in their paper and electronic files.

What the *Service Manual* Says

The *Service Manual* contains the following statements about making information public:

- On anonymity, p. 41: "The principle of anonymity acts as a restraint on members at the public level, to assure that no one will use Al-Anon for profit, prestige, or power."
- About the internet, p. 124: "The internet is a global computer network that is in the public domain. Service arms are encouraged to post WSO public service announcements on the internet or to create links to the WSO Public Outreach website."

What WSO Does

The World Service Office is a 501 (c)(3) nonprofit corporation with a \$5.5 million budget. All nonprofits with income over \$50,000 are required to make their IRS Form 990 available to the public on request. Form 990 includes a statement of the nonprofit's revenue, expenses, and change in net assets.

The WSO files Form 990 annually but also makes its financial reports available to members and the general public on its non-password-protected website.

With an income of less than \$50,000, Louisiana AFG Area Assembly, Inc. files a one-page "postcard" version of Form 990, which does not include financial information.

To view WSO's financial reports, log on to al-anon.org and navigate as follows: Members, WSO, Financial Information, 2017 Audit (pages 3-5), an Budget. The WSO has also published its 2018 budget in the *2018 World Service Conference Summary*, which is available online and in print.

What Other Areas Say

“As for posting of financials we do not do that today, nor is it something that I am aware of our discussing. Definitely interesting perspective and I can appreciate saving the cost of printing all the reports out. And something I will take back to our AWSC meeting for discussion.” —Treasurer, Area 17, Indiana

“California (No.) is required to post its year-end financial statements to our groups by our ByLaws. We also post quarter updates for their information. If anyone is interested, you can find them here: <https://northerncaliforniaal-anon.org/assembly-2018-documents/>.” —Delegate, Panel 54

“No we do not print on the website but all AWSC members receive electronic versions 5 times a year and we encourage the DR's to share with their GR's. Any member can request a copy from any of the above sources.” —Iowa Area Chair

“I would love to see our reports posted online also, for exactly those reasons. I feel that since there is no personal information in the reports and they are anonymous there is no downside to them being posted. We used to post our reports on the website, but we have a new website and the coordinator is trying to set up a segue into another area for our members to access these reports and not have them open to the public. I don't know what that entails, but right now the chairperson emails the reports to our officers, district reps and coordinators prior to each meeting so they can print them and forward them to their group reps.” —New York South Treasurer

The *La Treasure Chest* Model

Ever since *La Treasure Chest* went paperless in 2012, Area Assembly has been moving toward posting and transmitting material electronically.

The newsletter, event flyers, and other formerly paper-only documents are now distributed electronically using two methods:

1. Emailing a document to a distribution list of recipients.
2. Posting a document online where members can read and download it.

La Treasure Chest uses both methods. The newsletter is emailed to all groups. The current and archived issues are also accessible on the password-protected side of the state website.

Members access the newsletter by clicking a button labeled *La Treasure Chest*. The current issue is visible and downloadable, while archived issues are downloadable only.

Implementation

The Webmaster is prepared to display and archive treasurer's reports in the same fashion as *La Treasure Chest* should the Assembly agree to do so. Budgets might be posted the same way. Once the reports are posted, members can save the Assembly money by downloading their own copies.

The Five Elements of KBDM

1. Open communication between leadership and membership
2. Dialogue before deliberation
3. All those involved in the decision will have full access to all information
4. We have confidence in the competency of our partners
5. We exist in a culture of trust.

The KBDM Questions

1. What do we know about our membership's needs, wants, and preferences?

We know our members want accountability from their trusted servants, particularly in financial matters.

We know that in order for Louisiana AI-Anon to grow, we need sustained group, district, and individual contributions based on trust in Assembly's financial affairs.

2. What do we know about our resources?

We know that our resources for buying printed copies are limited.

We know that technical resources such as email and internet can deliver financial information to groups which are not represented at Assembly, particularly groups in remote areas of the state with no DR.

We know that improvements in the way we deliver information are an example of not standing still.

3. What do we know about changes happening in the world around us and in our communities that are relevant to this discussion?

We know that members of Generations X, Y, and Z who fill AI-Anon service positions are accustomed to using email, the internet, and portable devices for all tasks. For these younger AI-Anon leaders, paper is a thing of the past.

4. What are the ethical implications of our choices? List pros and cons.

Pro: Posting reports online may foster a sense of participation and shared responsibility in Area finances.

Con: Some members may fear that posting financial reports online will incite internal and possibly public controversy.

5. What do we wish we knew, but don't?

Will members be willing to assume the responsibility of bringing their own copies of reports to Assembly either in paper form or downloaded to portable devices?

Will Assembly reduce its reliance on printed material in general?