

## **Memorandum**

**To:** WSC Inventory Composite Group  
**From:** WSO Management  
**Date:** February 3, 1994  
**Subject:** WSO Staff Perspective on 1994-95 Inventory Plan

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The WSO management team spent several hours reviewing and discussing the revised proposal for the 1994-95 inventory project. We then compared the timeline and the projected staff resource needs of the proposal with our own management needs for the first six months of 1994. It quickly became clear to us that any significant commitment to the schedule by staff would be nearly impossible while considering the immediate management needs of the WSO. Coming off three years of not being able to add nor replace key staff positions, we had been planning since late 1992 to bring 1994 staff levels up to where we were in 1989. (The income from our two new major products make it possible now.) Our plan began to be implemented during the last quarter of 1993 and we expect to move at full speed in the first half of 1994.

As with any plan you have to prepare the best you can for the unexpected. Ours the last half of this year was an inordinately high number of staff absences for sick and maternity leaves and other personal tragedies. During the first half of 1994 it will be the loss of two primary managers, nearly one-third of the management team. These losses would be difficult at best under normal circumstances but in the middle of adding and training new staff it becomes a crisis. Our immediate management tasks now read like this for the first half of 1994:

- Search, hire, and train two new team leaders
- Search, hire, and train one new coordinator
- Training for new WSO-Europe Manager
- Training for new coordinator Conference Services Team
- Hire and train new staff for Shipping and Receiving Team
- Shift two staff members to new teams
- Develop, approve, and implement a new personnel policy
- Develop, approve, and implement a new staff evaluation procedure
- Develop, approve, and implement training plan for existing staff
- Coordinate w/consultant to assist staff and team adjustments
- Management training

Each responsibility noted above will take a considerable amount of management time and effort to succeed. Every team will require a substantial adjustment period to assimilate the new staff, most significantly the management team.

There are other concerns as well about the attention we need to give some of our most basic WSO service responsibilities: the production and distribution of NA literature; the development of our regular publications; administering the FIPT; translation work and group services. None of these have received the type of attention they are warranted during the past year or in some cases over the last several years. Instead, they get attention only when necessary or when a crisis develops. Unfortunately, crisis management has become the norm over the last several years but it is not a practice we want to continue to endure. When you add the amount of staff time already dedicated to continue basic services for the rest of the conference year and to support the annual meeting of the WSC, our task is staggering. (See attached schedule.)

The timeline outlined in the inventory plan places us in an unfortunate and unenviable position. Quite simply, we cannot accommodate the WSO self-assessment timeline while addressing our management needs. Every solution we discussed about how we could do both made the management situation more problematic. What makes our situation so difficult is that we support the inventory project and believe the results will offer positive changes to the way we do business. We just cannot afford to neglect our management needs during the time our self-assessment is scheduled. The same can be said about what may be presented as WSC basic services for 1994-95.

It is our recommendation that the WSO self-assessment needs to be delayed. This would help to give us the necessary time to establish an effective management foundation for the office. Our bottom line is we need your help, cooperation, and understanding.

**CC: WSO Executive Committee, WSC Interim Committee,**

# INVENTORY PROJECT STAFFING NEEDS

1/94 - 4/95

(in addition standard administrative duties  
such as handling phone calls, memos, etc.)

## INVENTORY STAFF

### **January 1994**

Inventory Update - Lee

Prep for data entry

- 1/2 day orientation SPSS - Lee & Steve
- Develop coding options - Steve
- Conference call - Steve

WSO tools group - Lee

- Maybe a brief mtg. at ws meeting  
(Nothing scheduled as of yet)

WSC self-assessment team - Steve

- Help develop orientation for ws mtg.
- work with tm. and panel members  
(2 hrs/wk)

Consultant search - Steve

talk with Barbara C, Stu and Tom (2 hrs)

### **February 1994**

SATs team - Lee

- review and forward completed SATs

## NON-INVENTORY STAFF

### **January 1994**

- \*Develop and prepare CAR
- \*Interim Committee Meeting

World services meeting (14-16 staff; 3-4 days)

- \*Hire and train new staff (4)

Orientation for recorders of committee and  
board inventories?

- \*Prepare new personnel policy for approval
- \*Prepare annual financial reports
- \*Prepare WSO Annual Report
- \*Staff performance evaluations

Two members of WSO mgmt team -1 ea. div.  
work with Tom, Rogan, Stu on WSO tools  
team

- \*Mail CAR

- \*Development Forum Preparations

- \*WSO 1994 Budget

- \*Mgmt Development Activities

### **February 1994**

- \*Prepare committee/board inv. results

Enter committee/board inventory results into  
system; 5-7 staff; 2-3 days?

- \*Prepare annual reports to WSC

- \*WSC Report and Digest

\*Develop WSO Annual Report and finalize  
Newsline

- \*Personnel training 4 1/2 days

- \*Development Forum

Coding of survey entries (all inv. staff 2-3 days)

Supervise data entry of surveys - Lee/Steve - 2 weeks (2/7-18/94)

Three temps to work for two weeks (maybe second shift?)

Inventory Update - Lee

\*NA Way, Reaching Out, MBM

Conf. Report - Lee  
summary of year's activities

WSO tools - Lee  
- face to face meeting over weekend  
- prep material for weekend and plan, memos, etc. following the meeting

Two members of WSO mgmt. team  
- develop ideas for plan  
- attend meeting, review plan, etc.

WSC tools/mgmt team - Steve  
- work with team and panel members  
(2-3 hrs. week)

Look at funding needs for final quarter - Steve

Consultant search - Steve  
- identify candidates, mail out material, prepare for interviews (2 hrs/wk)

CG conference call - Lee/Steve

Analysis of stats - Steve

### March 1994

### March 1994

Prepare for Comp. Grp. meeting - Lee/Steve

\*WSO Meeting  
\*WCC Meeting  
Two members of WSO mgmt. team prepare for CG meeting  
\*Development Forum Final Prep.  
Prepare for conf. call, review material, etc.  
\*WSO/WCC Annual Rpts. approved  
\*WSC Staff preparation and training  
\*Annual Data Services Reports  
\*Mgmt. Development Activities

WSO tools team - Lee  
- conf. call to finalize proposed material  
- mail out material to CG

Inventory Update - Lee

- WSC tools/mgmt. team - Steve
- work on small group composition
  - work on WSC inv. orientation
  - finalize disc. with panel members
  - choose moderators for panels

Data services printout of conf. population

One clerk typist - 1 day to enter reports for panel presentations (March/April)

- Begin prep for WSC'94 - Lee/Steve
- discuss note taking for final inv. activity

- Consultant search - Steve
- Interviews

- Begin prep for report for WSC'94 - Lee/Steve
- Lee to work with SATs team
  - Steve to work with stats. team

### **April 1994**

Composite group meeting (all inv. staff)

- Finalize prep. for WSC'94 - Steve/Lee
- finalize report
  - prep. for various inv. activities at conf.

Consultant search - Steve  
finalize interviews; prepare contract and profile for conference

WSC'94 - Steve/Lee/Marilyn?/other inv. staff  
(immediately after conference will need additional writing/editing staff to join inv. staff; may need to a different clerical staffer)

CG meeting report

### **May 1994**

- Orientation of consultant - Steve/Lee
- 10-12 hours per week

### **April 1994**

Two members of WSO mgmt. team  
Staff who will participate prepare for small groups as participants  
\*WSC Preparaton Activities  
\*Development Forum  
\*WSC Inventory  
\*Mgmt. Activities

WSO staff begin to prepare for self-assessment activity

### **May 1994**

Members of WSO management team may help in orientation?  
\*WSC Action Follow-up  
\*Minute preparation  
\*TWGSS  
\*New trusted servant orientation  
\*New personnel assignments  
\*WSC Report

Evaluation team - Steve/Lee/?

- enter results of conference inventory activities, and forward it to team along with SAT material

WSO self-evaluation - Steve

- coordinate activity of small team working with WSO staff

WSO self-evaluation

- staff begins process

Inventory Update - Lee

Summary of conference inventory activities

\*Annual Planning

\*Management Activities

If conf. approves plan, one division director starts working on CG.

\*Prepare for WSO mtg.

\*Prepare for WCC mtg.

\*Prepare for Interim mtg.

\*Compensatory time for staff

CG conference call - all inv. staff

- review upcoming activity, plan for June mtg.

June 1994

June 1994