

KNOWLEDGE BASED DECISION MAKING FORM/FORMAT

Topic:

To form a Thought Force, as proposed at Spring Assembly 2026, to consider under what circumstances it is appropriate to make contributions from the Ohio Area to AFG, Inc (also known as the WSO or World Service Office.)

This is a Thought Force only. This charge does not include implementation (timing and amounts), which will be determined by a later Task Force if necessary.

FRAMING:

The Ohio Area continues to be generously supported by our Al-Anon Family Groups (AFG's).

Our Area budgeting process includes both Budget Line Items, which are stipulated in our Handbook of General Procedures, and Assembly Reserve Funds, which are planned for expenses, that in many cases are only budgeted for "if funds are available."

Budget Line Items are based on the income (group donations) from the prior year. Our Area Annual Budget is proposed at Spring AWSC, and brought to Spring Assembly for approval of the Assembly. We operate from January through May based on the prior year's budget.

BACKGROUND INFORMATION: What we know:

Historical perspective: During the two years meetings were held virtually (2020 and 2021) groups continued to donate, but expenses were very low.

This allowed us to make a contribution to AFG, Inc of \$5,000 in both 2023 and 2024. Since returning to in-person, and providing hybrid Area meetings, expenses have continued to rise.

For 2026 our total Area Budget (Line Items and Reserve Funds) was \$35,349.

Our Ample Reserve is \$25,000.

Our 2025 Year End Balance was \$61,792.

This left \$1,243 unaccounted for (excess funds).

Existing Motions that appertain to this topic:

Motions were made at Fall Assembly 2023 and 2024 to make a contribution of \$5,000 each year to AFG, Inc, along with the motion made at 2026 Assembly for a contribution of \$1,250.

What do we know about our member's or prospective member's wants, needs, and preferences that are relevant to this discussion?

Groups financially support their meetings. Some also support their Districts, AIS's, LDC's, Alateen needs, and OAA. In some parts of Ohio, groups are sitting on a lot of \$\$\$. The Delegate receives a report on Donations from their Area – not itemized by group- ck with Rosie if Itemized by District and Group
Our groups want the Ohio Area to be fiscally responsible by finding a balance in Area reserve funds between budgeting the appropriate amounts for both needed and special projects and holding onto excess funds for fear of unknowns .

What do we know about the capacity and strategic position of the organization relative to this issue?

The Ohio Area issues an appeal letter twice a year. Our groups have responded generously to these appeal letters including during COVID. Motions were made in 2023 and 2024 to give \$5000 to AFG, INC.

At the 2026 Spring OAA, \$1250 calculated from a difference between the 2026 projected total budget expenses with and ample reserve and the 2025 total yearend balance and donated to AFG,INC.

Donations to AFG,Inc. are not defined in our Handbook.

Ample reserve is defined in our Handbook(Section XV, D, 8) as:

Develop an Ample Reserve of approximately one year's operating expense, to be securely invested

by the Treasurer, with the approval of the Budget Committee. The Ample Reserve amount will be

reviewed annually by the Budget Committee. (motion 2013-10 - # 16) (motion 2024/05 - # 4)

What do we know about the current realities and evolving dynamics that are relevant to this discussion?

Tradition 7 states that we are self-supporting and Warranty 1 references prudent financial principles

Current financial strains on the economy affect individuals and groups along with rising costs for the location of meeting spaces for the Area.

Area Meetings Hybrid meetings have increased meeting costs because of need for technology, team members, and equipment.

WSO has reported decreasing donations from groups and members for several years. Book sales are reported down from LDC's with more electronic literature available. (Quarterly COB and AFG Treasurer reports; Yearend summaries found in P-46's)

What are the ethical implications of our choices (pro and cons)? This includes consideration of how the Legacies apply.

Tradition 7- self supporting

Concept 1 – ample reserve, prudent financial principles

Guideline - Reserve Fund (G-41)

Recommendations:

We propose asking the Budget Committee finalize recommendations to add into the Ohio Handbook of General and Committee Working Procedures for Al-Anon Family Groups of Ohio, Inc.

A simple statement/description of the budgeting process for AFG, Inc.

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

Questions and clarification-

Need for a motion? If so, use the motion form provided by the Area Chairman

Presented By:

Thought Force Chair: Anne S