Experience, Strength & Hope from Past Intergroup Chairs

- Informal shares to support you in your service -

RESOURCES & SUPPORT

- Ask the previous chair to serve as an ex-officio chair for a period of time to ease the transition.
- Get a copy of How to Be an Effective Trusted Servant: www.oa.org/pdfs/trusted_servant.pdf.
- At each intergroup meeting, spend a few minutes reading from the pamphlet "OA Handbook for Members, Groups, and Service Bodies." By reading a few pages at each meeting we finish the whole pamphlet about once a year, and each month we learn something new.
- Be familiar with your intergroup Bylaws and Policies. These are often referred to and should be available for all attendees.
- Don't be afraid to ask for help! Just like our recovery, we won't always know what to do.... ASK! Ask the previous intergroup chair, ask your region officers/trustee, ask your sponsor.... just ASK!
- OA websites have lots of awesome ideas. Check out www.oa.org/documents/, as well as other region and intergroup websites!
- Build your OA Community! Reach out to other intergroups in your region to see what they do. Contact another region’s chair and ask to be connected to a couple of experienced intergroup chairs.
- Often the Serenity Prayer will get you past some tricky moments.
- Have basic bylaws, perhaps drafted from the WSO website:
  - www.oa.org/pdfs/bylaws_overview.pdf
  - www.oa.org/pdfs/sample_ig_bylaws.docx
- Keep your intergroup details up to date with WSO: www.oa.org/pdfs/igregform.pdf
- Familiarize yourself with the basics of Robert’s Rules of Order. These come in handy when running business meetings—they’ll help you stay on time and get through agenda items faster.
- Make sure your intergroup is CONNECTED to your region and to World Service! Send Reps to Region Assembly and Delegates to World Service Business Conference. Your intergroup’s participation will strengthen OA as a whole, AND it will strengthen your intergroup.
MEETING BASICS

- Have reports and minutes due and sent out in advance, so meeting time doesn't have to be taken up with these items. Use meeting time to discuss projects or for committee breakout meetings!
- A good agenda:
  - Is published in advance of the meeting
  - Is clear about what will be discussed, and the time allotted to each item
  - Allows for group input / interaction
- Respect members’ time by starting and closing the meeting on time.
- Use the Traditions and a simple system of Robert’s Rules to keep the meeting focused and peaceful.
- Be patient, flexible, honest, and open-minded. Know that everyone there has the good of OA in their hearts. Listen well. Let go of your ideas and let others "do it their way." Guide rather than direct. Suggestions go a long way.
- Have a time when intergroup reps can bring up questions or share about their groups.
- Create a one-page summary after each meeting, with the “bare bones” info you want to be conveyed to the groups. Catchy colors / clipart etc. are useful.
- Live and breathe by the Traditions! Ask your region board present a Service/Traditions/Concepts workshop.

RECOVERY, RECOVERY, RECOVERY!

- Remember our Primary Purpose in all things you do. Ask yourself and the group frequently if what you’re doing or thinking about doing will help the still-suffering compulsive eater. Don’t get bogged down in administrative tasks and lose focus of the bigger picture of why we exist as an organization.
- Keep the focus on personal recovery. Work on your own recovery. Encourage your officers and committee chairs to work on their recovery. The intergroup won’t be effective or attractive if recovery is not present among the those in leadership positions.
- Concentrate on what intergroup can do to help meetings carry the OA message of recovery.
- A good way to learn how the intergroup can help foster recovery is by doing an inventory and a member survey. It’s important to discover the unique needs of YOUR intergroup. (Check out the R1 Intergroup Renewal Handbook at www.oaregion1.org/intergroup-renewal.html).
- Don’t do things because “that’s the way they’ve always been done” or because that’s what your predecessor did—keep putting all actions through the litmus test of "does this help us carry the message?" You may encounter resistance if you decide to change things. Refer to the Traditions, especially Tradition 5, to help guide your actions and responses.
- Do make abstinence important; do create abstinence requirements for service. Abstinence requirements should be stated in the bylaws.
- Don’t fill the agenda with business! It’s wonderful to have program-focused presentations, as well.
- Bring recovery to the intergroup meeting to help you lead by example: have a speaker share their story before or after the meeting, pair the intergroup meeting with an OA meeting or workshop, etc.
- Hold a recovery event on the same day as the intergroup meeting. This brings service and recovery together and sends a very basic message that service is part of our recovery. Members who want the workshop may attend the intergroup as a visitor—this is good way of introducing them to service. Try to cover the Traditions and Concepts as part of some of these workshops.
Spend five minutes of the intergroup meeting having your officers share on what they are doing to strengthen their personal recovery.

Spend a few minutes in prayer and meditation before chairing the intergroup meeting.

### ENCOURAGE PARTICIPATION & SERVICE

- Approach your role with a sense of pride and enthusiasm! You play a key role, and members look to you for meeting consistency and support. Be the cheerleader—make people feel welcome and glad they came to the meeting!
- Ask members for help in setting up the room prior to the meeting.
- Ask sponsors to expect/recommend/ask their sponsees to give service at the intergroup level. At least try. Or go to a meeting, just to check it out.
- Ask members to give others a lift to the meeting – this encourages participation and fellowship.
- Recruit your OA buddies at the meeting level to come support your intergroup efforts. This will be especially important if you are trying to implement changes.
- Acknowledge and appreciate everyone who comes to intergroup, AND those who are not able to attend, but take other service positions and help keep groups going strong! We are ALL part of intergroup!
- Make intergroup meetings interactive, rather than just the board talking. Ask for input, ideas and solutions.
- Ask for help with small tasks. Our intergroup has a listing of “Service in Small Packages” on the agenda, with the last item being “Does anyone else need help?” Offering small service opportunities allows people to feel a part of and try service, even if they’re not up to holding an office.
- How to fill empty service positions: Ask people personally. Encourage them to use their ES&H and let them know others are available to help them as they learn. Let others know that giving service is AMAZING for your recovery!
- Be as inclusive as you can: [www.oa.org/pdfs/UnityWithDiversityChecklist.pdf](http://www.oa.org/pdfs/UnityWithDiversityChecklist.pdf)
- Give everyone who wishes a chance to share. Some are reluctant—try to find ways to help them feel safe speaking up. That’s not always easy.

### WORK AS A TEAM WITH YOUR BOARD

- Support one another in personal recovery.
- Work with your board to create a vision or theme for the year. Will you choose the Principles, Traditions or a one-word theme of “Unity”?
- Check in with people in service positions—ask them how it’s going and if they need help. If someone is overwhelmed, get them help, even with small parts of their job. Make sure people know they have backup and they will have an alternative to stepping down.
- Remember—you’re not alone. Learn to delegate!
- Meet with your fellow board members to discuss how things are going and what new directions you want to explore.
- Have regular board meetings prior to the intergroup meetings to share updates and ideas.
MAKING DECISIONS

- Use Robert’s Rules more or less depending upon group size. When it gets contentious use them a bit more. Remember that a group conscience deliberation and decision includes HP.
- Look for solutions in the “grey area” rather than in the “black and white.” Ex: “Let’s try this for two months and see how it works,” rather than “Let’s make a new Bylaw about that right now.”
- Look for the spiritual solution to issues.
- Check out the consensus guidelines: www.oa.org/pdfs/consensus.pdf.
- Be enthusiastic about service, carrying the message, and resolving issues with the Traditions.
- Don’t make a decision until you hear all sides.
- Help the group move along to a decision, especially on minor items. Sometimes we can debate even the smallest issues for a long time, and that can get frustrating. However, sometimes issues are very important to people, and there are strong feelings involved. It’s important to know when something needs more time, thought and discussion. It’s usually okay to postpone an item of business until next month.
- Sometimes we run out of time to reach consensus at one intergroup meeting. Very few decisions need to be made urgently. A long-time member suggested that a close vote means there is no consensus. It does take more time, but it is well worth it in the long run.

EASY DOES IT!

- Don’t be scared! We’re all in this together and none of us is in charge! Just because you’re the intergroup chair doesn’t mean you know more than the person next to you. We can’t do this perfectly, but you were willing to take on a leadership role...it may be new to you, but that’s how we develop new skills.
- Handling the time commitment: God put you in this position to use your talents, but also to keep it simple and in balance. Ask yourself "How important is this?" or "Are babies dying over this?“ Watch the time commitment and learn to say "no" nicely.
- Don’t forget Rule 62 – never take yourself too seriously!
- Ask for help when you need it.
- Don’t let your service work replace your recovery work.
- Don’t despair when others do something differently or “not as well” as you do. Learn to let go and let others do tasks their way.
- Remember why you stepped up to do this awesome service and know that HP equipped you with what you need to lead.
- HAVE FUN!!!
Experience, Strength & Hope from Past Intergroup Secretaries

- Informal shares to support you in your service -

RESOURCES & SUPPORT
- Read the minutes section of Robert’s Rules.
- If there a manual or binder for your service position, use it to follow timelines of tasks for which the secretary is responsible.
- Have a proof-reader for content and grammar.

DO THIS BEFORE THE MEETING
- If you must miss a meeting, find a sub to do the minutes.
- Keep all important papers in a binder, but don’t keep every piece of paper your group produces!
- Ask the chair for an agenda, and use it to prepare a template for the minutes.
- Keep the secretary’s binder up-to-date with updated Bylaws, Policy & Procedures, etc.
- Streamline your service—take the minutes from the last meeting and “save as” the new date, then change the names of people who attended, etc. It only takes a few minutes to do the minutes that way. Why reinvent the wheel?
- Keep things organized and easily accessible for members. Set up a Google Drive with folders for each meeting so that board members and intergroup reps can grab the minutes and PDF handouts from those meetings on their own.
- Keep updating an attendance spreadsheet so that when it’s time for nominations for board members and World Service and Region Reps, it is clear from the spreadsheet who is eligible to run and who is not (example: needing six meetings attended in the last two years). This will greatly help the Nominating Committee with their task of seeking out volunteers to serve on the board.

THE BASICS OF TAKING MINUTES
- Doing minutes in real-time on a computer word processor helps get the job done quickly.
- You can take minutes by hand or with a computer, but using a computer is generally quicker than writing and you can have everything completed by the end of each meeting.
- If you have to, record the meeting, but don’t try to type it all in real-time.
- Take brief notes during the meetings, capturing all decisions and action items.
- Listen well at the meeting, and be patient.
- Ask for clarification at any point during the meeting to make sure you have recorded correctly.
- Highlight action items so they stand out: **Action item for Jenny: Order 12 copies of the Big Book.**
Record the wording of motions accurately, as your minutes are the memory of your intergroup. Repeat the motion to make sure it is worded correctly before it is voted on. Record the name of the person making a motion.

Summarize long discussions—every word does not need to be recorded, only key information.

If there was a long discussion with a conclusion that did not end in a motion/vote, verbally summarize the conclusion for the group so everyone can be on the same page.

**ASK FOR WHAT YOU NEED**

- Ask for clarity at the meeting for any motions presented so that these can be accurately recorded.
- If folks are speaking over one another, get the attention of the chair and ask her to stop all discussion, or call for the Serenity Prayer.
- Ask for a twenty-second pause between topics.

**DO THIS AFTER THE MEETING**

- Don’t wait until the night before the intergroup meeting to prepare the minutes because (a) your clear memory of the meeting will help you prepare accurate minutes, (b) your chair needs the minutes to help prepare the agenda for the next intergroup meeting, and (c) you’ll save yourself from stress knowing that you’ve fulfilled your commitment on a timely basis.
- Send your draft minutes to the board and other key members for edits. Send an updated copy after making corrections, this time copying all group reps and intergroup committee members.
- Publish in PDF or html format; not everyone will have Word or whatever program you use.
- Keep a copy of the minutes, finance report, and other important documents each month. Keep an electronic copy of minutes.
- Usually "taking notes" is different from "writing minutes." Take notes during the meeting and write up minutes afterward. Notes are just memory joggers. **Minutes, in contrast, need to communicate what happened to people who weren’t present.**
- Don’t flood intergroup reps with emails; collect information in a folder and send out all information at once, unless it is urgent. Aim for two emails a month; one a week before the intergroup meeting to send the agenda and minutes, and announce the meeting; the second email includes the draft, unapproved minutes as soon as possible after intergroup.

**CORRECTIONS TO THE MINUTES**

- Be sure the chair has reviewed the minutes in advance.
- Don’t take corrections personally—it’s okay if your minutes need edits.
- Set aside ego when it is time for the vote to approve the minutes.
  Remember your job is one of service, so if there is a better way of capturing a topic in the minutes, concede. On the other hand, if someone wants to change history, remember that you have responsibility for the meeting record and you must stand your ground (politely and without ego) if you are certain of your minutes.
- Sometimes members will disagree with what was written. Remember that you are recording what occurred and not editing based on what people believe should or should not have happened.
HOW TO HELP YOUR INTERGROUP CHAIR...FROM THE PERSPECTIVE OF THE CHAIR

Secretaries make a real difference in helping a meeting run smoothly, so that we can focus on the agenda. You can help me by:

- Sending out reports, minutes, reminders, etc. a few days in advance of the meeting, so that everyone can read in advance and be prepared.
- Keeping minutes short—record motions exactly as stated / passed, and include the term of service for any election (I promise we'll have to go back and look for this!)
- Arriving at the meeting 15 minutes early to ensure materials are available to attendees.
- Sending out draft minutes within a few days of the meeting to a small group of people who have agreed to help proofread, then, after corrections, sending the new draft out to the whole group.
- Sit next to me during the meeting, so you can let me know if you need clarification--if you need it, you're probably not the only one.
- Help ensure that our documents are up to date -- when we hold elections, please update the list and include the terms of service; when we update the bylaws, please ensure the document is updated and the webmaster receives a PDF to upload.
- If we're not already doing so, help us establish an online place to store our records, such as DropBox or Google Drive.
- In short -- help us be organized! 😊

TAKING CARE OF YOURSELF

- Be ok with not participating in the meeting
- Don't procrastinate writing up the minutes after the meeting.
- Stick to your service term length. It's a commitment to be a secretary, and training a new secretary every month or two can cause stress and confusion within the group. Likewise, going beyond your term will not allow the position (and associated growth) to be available to other members. Mentor your group's next secretary! Work alongside them for their first two meetings so that they can ask questions and get familiar with how things are run and where papers can be found.
- Don't strive for the "perfect" minutes. Just do them.
- Don't try to do absolutely everything yourself. Ask for help when needed! We're only human! 😊
- Don't be afraid of making a mistake—it can be corrected easily!

Thank you for your amazing service!
Experience, Strength & Hope from Past Intergroup Treasurers

- Informal shares to support you in your service -

RESOURCES & SUPPORT

- Spend time with the previous treasurer to learn the system, and call them with questions.
- Avoid hauling around a box of old files—scan and store documents in the Cloud.
- The OA website offers excellent resource pages for treasurers:
  - www.oa.org/groupsservice-bodies/groups/treasurer-materials
  - www.oa.org/pdfs/ig_treasurer_guidelines.pdf
  - www.oa.org/pdfs/budget_guidelines1.pdf
  - www.oa.org/groupsservice-bodies/guidelines/

REPORTING

- Go to all intergroup meetings during your tenure, and report financials at each meeting.
- In addition to your spreadsheet, include a “narrative” report that gives an overall picture of the intergroup’s financial status. Communicate concerns, if appropriate, but also share gratitude for the financial support of groups which have donated.
- Publish a monthly or quarterly list of donations received from groups. This provides a receipt, increases transparency, helps catch any errors made in crediting deposits to the appropriate group, and raises awareness of contributions to service bodies. You can publish this list in your local newsletter, your intergroup email loop, or (at least) have it available at intergroup.
- Don’t take questions about money personally. Sometimes being the guardian of the funds makes that person a bit prickly. Remembering that the money is not solely the responsibility of the treasurer helps.
**ORGANIZATION and TRANSPARENCY**

- Don’t panic—it doesn't take that much time to be a treasurer, contrary to popular belief.
- Have a budget! It may be very simple, but it keeps track of your income and spending plans. At the end of the year, review spending and income and adjust next year’s budget accordingly. Check out www.oa.org/pdfs/budget_guidelines1.pdf.
- Keep records up to date, daily, if possible. Make deposits as soon as possible. Pay bills and reimbursements even sooner. Keep all receipts and statements reconciled weekly at the very least. Keep double records as a safety net. Treat monies carefully, it's important.
- Make being treasurer a part of your OA program: set aside a time each week to record 7th Tradition contributions and pay bills -- don't wait to balance the account until the day before intergroup.
- Carry envelopes. People often want to give checks or cash to treasurers, and it is easy to get confused. If someone wants to give you money for intergroup, give them an envelope and have them write the amount, meeting number, and any other relevant information on the outside of the envelope. Always double-check amounts when you're given cash.
- Use QuickBooks or similar software.
- Use a simple Excel spreadsheet to create the monthly report. Do a spreadsheet for the whole year. That way, it is easy to fill out each month.
- Organize and document as if there were a possibility you might not be available for the annual audit.
- Keep your landlord happy. Don't be late on rent.
- Always make copies of all checks and deposits.
- Make all money as transparent as possible. Record all transactions in the check register.
- Give the chair a copy of the ongoing check registers every month.
- Don’t skip doing a bank reconciliation monthly. Mistakes are picked up when the check book balance and the bank balance don’t match.
- Keep a spreadsheet of member group contributions for accuracy and efficiency.
- Every monetary transaction should be identified by group number, as well as group name. Make sure all checks written to Intergroup, Region and World Service have the correct meeting or service body number written on the check. Otherwise, the donation will not be credited properly, which will cause confusion and extra work for others in OA service. Double-check group numbers at www.oa.org/find-a-meeting/.

**BUDGETING & AUDITS**

- Have a budget!
- Communicate budgeted amounts to members about to incur expenses on behalf of intergroup.
- Ask for volunteers to Audit the books once a year. Don’t assume everything is correct; confirm it! This is an easy and relatively painless experience, and lets everyone know the status of the funds.
SECURITY & BANKING

- Check with your bank to assure that the signatories on the account are current. Remove folks who are no longer authorized to sign checks from the account.
- Be sure to have the intergroup's incorporation papers or other paperwork on its existence and structure, like bylaws, when changing signatories on accounts. Call ahead to the bank to find out what they need to change signatures. They often need both the outgoing and new treasurer present to complete the change.
- Don’t assume the bank is always correct; question the bank if you find a problem.
- If you accept 7th Tradition via PayPal, deposit the money into your intergroup checking account right away. Don't keep a PayPal balance. It's not necessary, and can lead to confusion. When you transfer funds, check the online bank account a few days after making a transaction; don't assume the transaction went through.
- Get a liability insurance policy for your intergroup.

ENCOURAGING 7TH TRADITION

- Encourage the 7th Tradition—read articles on the importance of sustaining the fellowship and carrying the message of recovery, become familiar with the 7th Tradition in the OA 12&12, write an article about the 7th Tradition in the local newsletter. Contact groups who have not contributed in a while to see if there is anything you can do to help encourage contributions for all levels of the fellowship. Offer a 7th Tradition workshop.
- Don't use regular OA meeting time to discuss intergroup money issues.
- Encourage members to set up an Automatic Reoccurring Donation (ARC) to World Service. This is easy to set up at www.oa.org/contribute/.
- Members can also use their own online banking to set up a regular contribution to OA World Service, Region, or Intergroup.
- Acknowledge and express gratitude for donations received.

ROTATION OF SERVICE

- When a treasurer is going to rotate out, start "grooming" a qualified candidate or two several months before the election on how to be a treasurer and on how easy it is to do the work. Let them know you will be available to help.
- Be positive about your service position – it is easy for people to feel that the treasurer position is very difficult and that they would never be able to take on this service. You have an opportunity to encourage and mentor someone in this service when your term is complete.
Look at other intergroup websites to find ideas for events.

Find speakers by listening to online audio, or ask your region for a list of speakers.


Find event resources at www.oregon-oa.org/event_calendar/event-resources/

Ask your intergroup or service body to provide “seed money” for events.

Check out the event formats at www.oa.org/groupsservice-bodies/resources/workshop-formats/

Plan to attend events and offer to help with setup, etc. Bring a bin with extra supplies.

Let the hosting group know they don't have to purchase XX and XX because you'll be bringing these items with you. Give them a list of supplies already in the event box.

Consider asking your intergroup to purchase a sound system. It’s hard to have a successful event if the speakers cannot be heard. Sound systems intended for the spoken word don’t need to be expensive. Train a few people to run the sound system and ask them to help with this at events.

Consider purchasing a device to record speakers. Ask for a volunteer to edit the recordings using a program like Audacity.

Keep electronic resources on your intergroup website -- checklists, past event flyers, workshop outlines, etc. Let hosting groups know they don’t have to “start from scratch.”

Help the group publicize their event, remind them to bring flyers to intergroup and other events leading up to their workshop.

Help groups say “yes” to hosting by asking at least six months ahead of the desired date. That way they know they have plenty of time for planning.

Ask meetings to host events, and then be a “resource person.” Support the group in any way you can and be responsive when asked for input, but allow them to take ownership of their event.
CHOOSING A LOCATION

- Choosing a venue must happen *early* in the event planning—all other details are moot until you have a place to hold the event!
- Make sure the location is easily handicapped accessible. Ask someone with mobility issues to help you create an accessibility checklist.
- Consider food needs—will it be necessary to travel a distance to obtain food? That will slow down return from lunchtime.
- Consider parking availability and public transportation access.

BIG EVENTS!

- Divide tasks between numerous groups or intergroups; identify the major categories of help needed, and ask groups or intergroups to take on an area of need.
- Consider using an event planning company to negotiate hotel contracts to get you the best rate. They are paid by the contracted hotel.
- Don't rent things like easels from hotels -- a one-day rental for these items will often cost more than purchasing the item outright.
- Do some research online before negotiating hotel contracts. Google the phrase "how to negotiate an event contract with a hotel." Many items that are standard in hotel contracts are routinely negotiated out, but you have to know to ask. Ask for extra concessions, such as event planner points, which you can use toward another event.
- For reoccurring events, develop an RFP (Request for Proposal) form outlining your requirements, and get proposals from a number of hotels. Create a manual to help others who will host this event in the future.
- Ask for a late checkout for your event planning staff—they’re the ones who will still be at the hotel at 2 pm on Sunday afternoon! 😊
- Get lots of helpers for your OA event -- this not only lets people feel useful, it will keep you from doing everything yourself. Ask for help EARLY in the event planning process. *If someone offers to help, say YES! :)*
- Expect that the team putting on the event may become stressed and feel overwhelmed -- everyone wants very much to do a great job, but most of us are not professional event planners. Check in with your team to see who needs help, say thank you often, and let them know that things don't have to be "perfect" for the event to be helpful to OA recovery. Consider holding a meditation meeting before the event to help everyone get centered.
- Utilize the tool of Action Plan, and use it to set clear actions and completion dates.
- Seek out someone who has chaired a similar event and ask them to share their experience, strength and hope.
- Nothing is more important than your abstinence. If it doesn’t support your recovery and abstinence, turn it over and let others do the service.
- Hold regular planning meetings, with an agenda and notes for each meeting. That way people can review what was accomplished and what is yet to be done. Ask people to volunteer for each item on
the to-do list, then gently ask them to report their progress. That way leadership is shared and more people can own the process.

> Consider telling people they don’t have to attend committee meetings once they have their assignment and are working on it. This helps people not feel over-committed.
> Don’t forget to attend the event yourself! Especially for conventions, it’s easy to get so involved in managing the event and forget to attend any of the workshop sessions. Ask team members which workshops are most important to them, and arrange coverage so that everyone gets to participate in the recovery portions of the event.

### TIPS FOR A FUN EVENT

> Ask for volunteers to be “greeters,” to give a warm welcome to participants as they arrive.
> Adults learn by doing, not by listening. How can you engage people? Small groups? Writing? Shy people or newcomers may share at their table, but not in a larger setting.
> Offer a variety of activities that will be helpful for different styles.
> Set an interactive tone with “pop-up” sharing—ask a question and ask people to just call out their one word or short phrase answers. This can get people engaged quickly and is easier for many people than coming up to the microphone.
> Involve people by asking them to do a reading.
> Consider a short, humorous skit at the start of your event. Check out
> If you want people to mingle, give every person a number when they arrive, with their table assignment. This will help people get to know their OA fellows from other areas.
> Include newcomers in planning an event, but keep their contribution limited to one area, so they are not overwhelmed.
> Don’t expect everything to be perfect!

“The principle of service which underlies OA’s Twelfth step, can now guide our actions both inside and outside the program. Here, we experience the great truth that when we let go of our need to control people and simply allow our Higher Power to serve others through us, we receive an abundance of joy and strength.” *OA 12&12, Second Edition, page 86.*