



**PLANNING FRAMEWORK  
LIFERING'S 2011 YEAR OF PLANNING**



# DOCUMENT INFORMATION

**Title** | PLANNING FRAMEWORK

**Abstract** | The planning framework is essentially the plan for our year of planning. It is a temporary skeleton to structure long-range goals and objectives – as they evolve – by integrating and organizing the potential actions contributed by current and former LifeRing members into a draft Long Range Plan.

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# INTRODUCTION

For a full ten years, LifeRing has provided sober, secular self-help programs to people who want to enjoy meaningful lives free of drugs and alcohol. In that decade, LifeRing's efforts grew organically, via expansion out from existing geographical centers and via proliferation of information on the world wide web. The mission and goals of the organization were grounded in decision-making by LifeRing's Board of Directors, the publications of LifeRing Press, and the visions of its founders.

In June 2010, LifeRing began a transition to build its capacity to meet two specific demands: At the retirement of founding CEO Martin Nicolaus, the Board of Directors recognized the need to create a new structure with more distributed responsibility and authority for program development and decision-making. At the same time, the organization was challenged to prioritize use of limited resources to meet the steadily increasing demand for LifeRing's services.

Meanwhile, the pace of change is daunting:

- The number of people struggling to overcome addiction is steadily increasing.
- Knowledge about methods for overcoming addiction is advancing exponentially.
- Opportunities for connecting people to sobriety programs are rapidly proliferating.
- Traditional self-help recovery support is becoming more pervasive and more outdated.

LifeRing's ability to keep up with the momentum depends upon using our very limited existing resources to achieve the greatest possible effects. We have an opportunity to build the capacity of the organization to deliver more up-to-date, timely and comprehensive support to more people who desperately need us. At the same time, we must continue to improve the excellent services LifeRing provides to current members.

LifeRing is thriving, and in new ways, but this is a pivotal time. Many nonprofits do not survive the departure of dedicated founders. Few nonprofit organizations are able to take full advantage of the moment when existing systems are poised for momentous change.

The best way to further our mission and to insure that our resources are used wisely is to plan effectively. We can learn from the experiences of other nonprofit organizations, capitalize on a vast array of effective organizational resources, and save a great deal of time and money in the process.

The same focus on thoughtful planning which grounds our sobriety programs can inform LifeRing's organizational systems. Planning reflects LifeRing's emphases on achieving understanding, elaborating and evaluating strategies, communicating to establish new ways of thinking, and acting with determination to overcome obstacles and accomplish meaningful change.

# OVERVIEW

## 2011 YEAR OF PLANNING

The LifeRing Board of Directors is committed to a year of planning for the future of our organization, starting June 1, 2011 and ending in May 2012. The year begins with the appointment of a planning coordinator, adoption of an interim planning framework, and agreement on a planning rationale.

### PLANNING COORDINATOR

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The planning coordinator is tasked to conduct planning processes, to insure opportunities for involvement by leaders, volunteers, and members throughout the organization, and to document both the results achieved through consensus and those issues that require further decision-making by leadership.

### PLANNING FRAMEWORK

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The planning framework is essentially the plan for our year of planning. It is a temporary skeleton to structure long-range goals and objectives – as they evolve – by integrating and organizing the potential actions contributed by current and former LifeRing members into a draft Long Range Plan.

The proposed schedule for planning activities is adaptable, but should remain relatively stable to provide predictable benchmarks for the planning process. Multiple opportunities for involvement are scheduled in order to present individuals with many chances to contribute, and to overcome the difficulties of bringing together all the key people at a specific time in a particular communications channel. No one individual is expected to participate in all of the planning activities, but systems will be provided to document and publicize progress and receive feedback as the plan evolves.

### PLANNING RATIONALE

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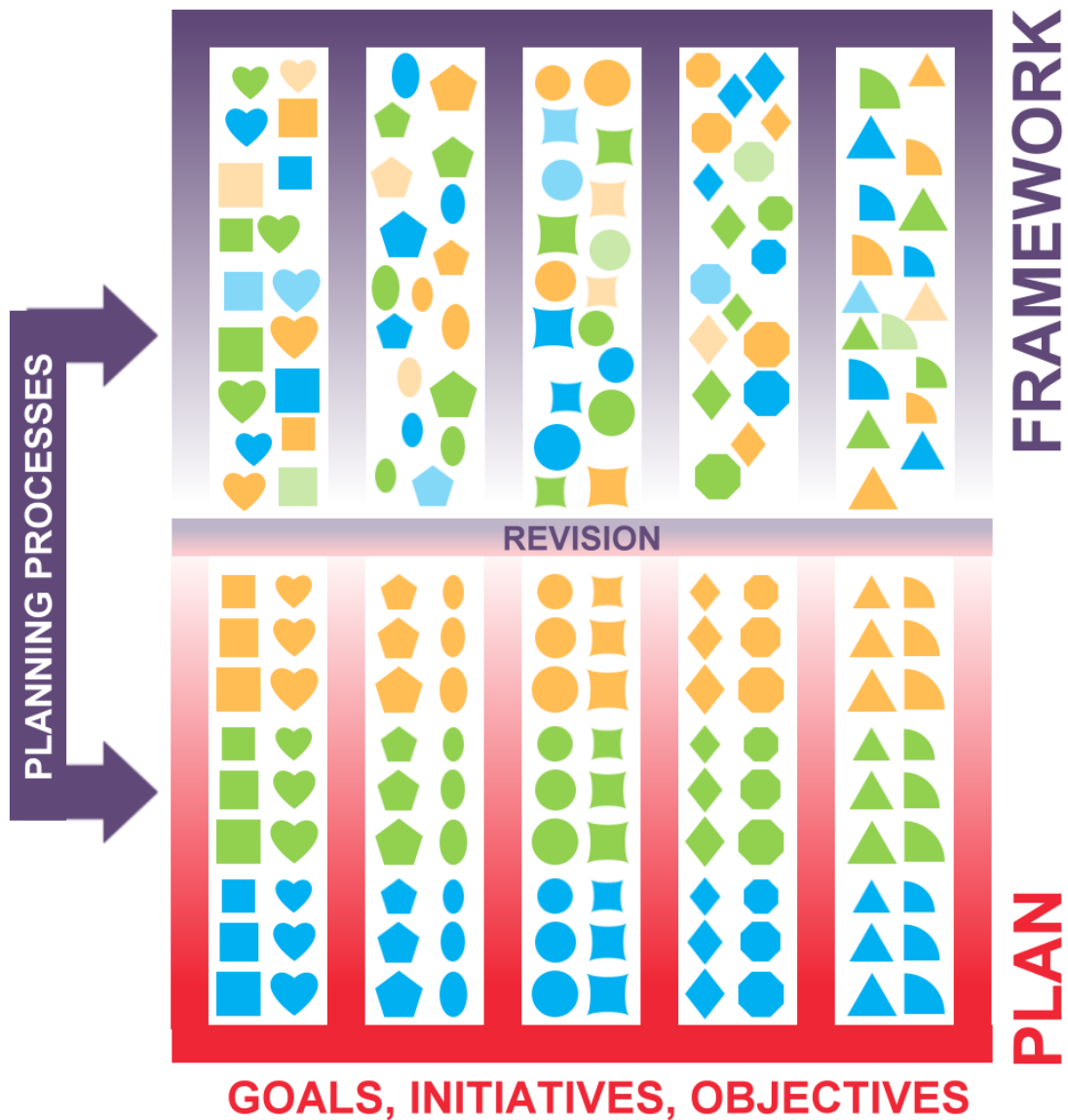
The theory and rationale that provide the basis for this framework are detailed in a separate document. This rationale will guide the planning process. Where possible, processes were selected that stress positive progress rather than problem solving. Systems theory and processes based in appreciative inquiry and dialogue are the guiding models.

## GOALS FOR THE YEAR OF PLANNING

- Thoughtfully consider LifeRing's values, beliefs, vision, mission, initiatives, goals, and objectives from the perspectives of its diverse membership.
- Establish an informed understanding about the degree of consensus that exists relative to these organizational foundations, to shine light on unstated assumptions and resolve ambiguity.
- Establish a comprehensive, logical and adaptable planning framework to organize LifeRing's efforts.
- Detail, document and organize LifeRing's current and prospective activities.
- Research, clarify and focus LifeRing's development and prospects.
- Offer benchmarks against which to measure and review LifeRing's performance and progress.
- Present a formal long range plan to be considered at LifeRing's 2012 Annual Meeting.
- Provide leaders with effective tools for identifying emerging and priority issues and creating the strategies and policies to address them.
- Involve people throughout the organization in the planning process to capture ideas, encourage innovation, and motivate volunteerism.
- Increase the knowledge, skills and abilities of LifeRing's leadership, staff, and volunteers.
- Enhance LifeRing's efforts and maximize the effective use of our resources.



IDEAS AND INSIGHTS



# DIVISION OF WORK

Based on the considerations discussed regarding planning tasks, LifeRing members, the Planning Coordinator, and the LifeRing Board of Directors will have the following planning responsibilities and authority throughout the year of planning.

## Board of Directors

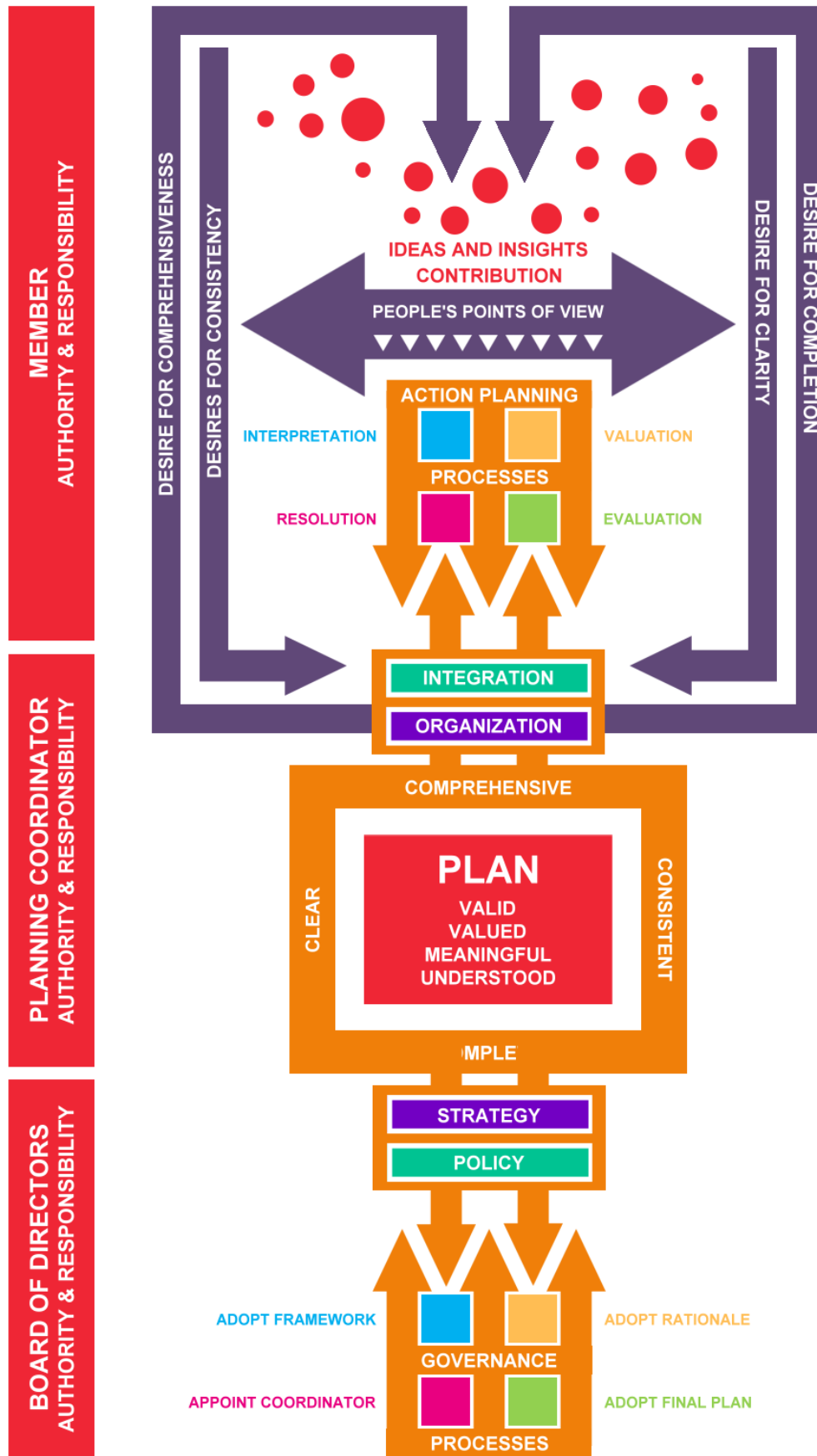
- Adopt interim framework and planning model.
- Appoint planning coordinator.
- Provide resources to support the planning process.
- Contribute ideas and insights.
- Adopt final long-range plan.
- Set policies.
- Decide among alternatives through strategic and tactical planning processes.

## Planning Coordinator

- Design, implement and facilitate planning processes.
- Research, refine and structure ideas and insights.
- Organize actions within a consistent framework.
- Ensure alignment between foundations and content.
- Develop and analyze alternatives.
- Research situation and forecast trends.
- Write planning documents.

## Members

- Contribute ideas and insights.
- Detail potential actions.
- Interpret, value and evaluate knowledge from data.
- Suggest alternative methods, processes, and points of view.



# INITIAL GOAL STRUCTURE

## DESCRIPTION OF THE FRAMEWORK

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### THE FRAMEWORK REFLECTS NONPROFIT BEST PRACTICES.

The structure adapts the elements of standard nonprofit plans to LifeRing's current mission as adopted by LifeRing's Board of Directors. The basic framework includes ten initiatives organized beneath five major goals. For convenience, each of the initiatives is assigned a name that will be used to designate that subject matter.

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### THE FRAMEWORK IS TEMPORARY.

The wording of these major goals and initiatives – and the greater detail in the plan – will change over the year of planning to better reflect the many perspectives of the people who are involved, consensus about the terminology which best represents LifeRing's beliefs, and further elaboration of our mission and vision.

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### THE FRAMEWORK IS GENERAL.

It is important to remember that the goals and initiatives are very general and should remain so. They are measurable only by assessing achievement of their underlying objectives and ought not define or suggest particular strategies or agendas.

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### THE FRAMEWORK IS COMPREHENSIVE.

Taken together, the goals should encompass all of the activities of the organization. They are broad and encompassing, even as they distinguish LifeRing from other groups.

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### THE FRAMEWORK IS LONG TERM.

There is no expectation that any of the possible goals, initiatives or interim objectives detailed in the framework should commence in the short term. In fact, the temptation to act immediately on every good idea should be resisted to the extent that it diverts attention from the long range planning process, which should guide such future strategic decision-making.

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### THE FRAMEWORK LISTS POSSIBILITIES, NOT PREFERENCES.

The framework is created to list the possible activities of the organization, so that leaders may determine which activities should be accomplished -- and when -- within a comprehensive context. Strategic planning should follow the adoption of the long range plan in mid-2012.

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### THE FRAMEWORK ORGANIZES. IT DOES NOT PRIORITIZE.

As long range planning continues throughout the coming year, ideas and contributions will emerge at all levels of detail. It is the task of the planning coordinator to identify, document, and organize all of the ideas and contributions without assigning priority. Whether a contribution is listed as an objective, a strategy, a tactic, or part of a work plan will depend on its specificity and measurability, not its relative value.

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### THE FRAMEWORK GUIDES, IT DOES NOT GOVERN.

When potential strategies, policies and decision-points emerge from the planning process, the planning coordinator will seek out, consider and elaborate alternatives, and then to organize the options for eventual consideration by the Board of Directors. The planning framework is not intended to make decisions or to create an agenda.

# PRELIMINARY GOALS AND INITIATIVES

## PLAN EFFECTIVELY TO ACHIEVE LIFERING'S VISION AND TO MEET THE CHALLENGE OF CHANGE.

<b>Foundations</b>	Review LifeRing's Long Range Plan and foundations on a five year cycle.
<b>Planning</b>	Plan strategically on a five year cycle to align LifeRing's Strategic Plan with our goals and a changing environment.
<b>Operations</b>	Establish and maintain the LifeRing Operations Plan and procedures to document the basic requirements for the organization to function effectively.
<b>Leadership</b>	Create LifeRing's Leadership Initiative and establish processes to promote continuity of effective leadership, policies, and decision-making.

## DEVELOP AND MANAGE LIFERING'S HUMAN, MATERIAL, AND KNOWLEDGE RESOURCES WISELY.

<b>Volunteers</b>	Cultivate LifeRing's Volunteer Initiative to attract and retain skilled people who can work together to achieve LifeRing's vision.
<b>Funding</b>	Develop LifeRing's Funding Initiative so that financial resources are available to meet the basic needs of the organization and to further LifeRing's goals.
<b>Knowledge</b>	Develop and maintain LifeRing's Knowledge Initiative in order to inform planning and decision-making, and to organize and distribute sobriety resources.

## BECOME SO VISIBLE AND ACCESSIBLE THAT ANYONE EXPERIENCING PROBLEMS WITH DRUGS OR ALCOHOL WILL KNOW HOW LIFERING CAN SUPPORT THEIR INDIVIDUAL JOURNEY TO A SOBER LIFE.

<b>Visibility</b>	Develop and maintain LifeRing's Visibility Initiative to communicate with the people who can contribute to our efforts and to reach the people who need us.
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## OFFER A DIVERSE ARRAY OF EFFECTIVE RESOURCES, SELF-HELP OPTIONS, AND SECULAR SUPPORT OPPORTUNITIES TO PEOPLE THROUGHOUT ALL THE STAGES OF SOBRIETY.

<b>Sobriety Resources</b>	Develop and maintain LifeRing's Sobriety Resources Initiative to provide comprehensive and diverse program choices for the people LifeRing serves.
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## PROVIDE EVIDENCE THAT PEOPLE CREATE HAPPY AND MEANINGFUL SOBER LIVES BY PARTICIPATING IN LIFERING.

<b>Progress</b>	Develop LifeRing's Progress Initiative to establish and maintain credible evidence-based processes to monitor and evaluate LifeRing's measurable achievements.
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# GLOBAL OBJECTIVES BENEATH GOALS AND INITIATIVES

## PLAN EFFECTIVELY TO ACHIEVE LIFERING'S VISION AND TO MEET THE CHALLENGE OF CHANGE.

Review LifeRing's Long Range Plan and foundations on a five year cycle.

- Plan for LifeRing's future.
- Review foundational planning elements to ensure that each accurately reflects desired outcomes:

LifeRing's Mission	LifeRing's Core Values	LifeRing's Goals
LifeRing's Vision	LifeRing Believes	LifeRing's Objectives
LifeRing Bylaws	LifeRing Choices	Articles of Incorporation
- Identify significant unacknowledged and acknowledged assumptions.
- Revise objectives to reflect the changing situation, new methods, and advances in evaluation.
- Develop a model for organizational change.
- Establish and maintain an effective LifeRing Organizational Design.

Plan strategically on a five year cycle to align LifeRing's Strategic Plan with our goals and a changing environment.

- Establish a strategic planning process.
- Understand the strength of LifeRing's organization and resources.
- Understand LifeRing's situation relative to the environment of addiction and sobriety.
- Evaluate challenges and opportunities related to LifeRing's initiatives and programs.
- Develop alternative strategies for furthering LifeRing's goals.
- Make thoughtful and considered strategic decisions.

Establish and maintain the LifeRing Operations Plan to document the basic requirements for the organization to function effectively.

- Document and maintain LifeRing's basic operational processes.
- Conduct oversight by leadership.
- Evaluate the contribution of operations to LifeRing's goals.

Create LifeRing's Leadership Initiative and establish processes to promote continuity of effective leadership.

- Represent the diverse points of view of LifeRing members and those still in need.
- Create and sustain policies to further LifeRing's goals.
- Make effective, consistent and strategic decisions.
- Develop leadership talents and strengthen competencies.
- Evaluate the contribution of leadership to LifeRing's goals.

## DEVELOP AND MANAGE LIFERING'S HUMAN, MATERIAL, AND KNOWLEDGE RESOURCES WISELY.

Cultivate LifeRing's Volunteer Initiative to attract and retain skilled people who can work together to achieve LifeRing's vision.

- Recruit volunteers to further LifeRing's goals.
- Train our volunteer workforce.
- Evaluate the contribution of volunteerism to LifeRing's goals.

Develop LifeRing's Funding Initiative to ensure that financial resources are available to meet the basic needs of the organization and to further LifeRing's Goals.

- Maintain financial accountability.
- Define current and potential needs for financing.
- Develop fundraising capacity.
- Evaluate the contribution of financial resources to LifeRing's goals.

Develop and maintain LifeRing's Knowledge Initiative in order to inform planning and decision-making, and to organize and distribute sobriety resources.

- Improve the breadth and depth of LifeRing's knowledge resources.
- Organize LifeRing's knowledge resources for accessibility.
- Document and archive LifeRing's organizational activities.
- Evaluate the contribution of knowledge to LifeRing's goals.

**BECOME SO VISIBLE AND ACCESSIBLE THAT ANYONE EXPERIENCING PROBLEMS WITH DRUGS OR ALCOHOL WILL KNOW HOW LIFERING CAN SUPPORT THEIR INDIVIDUAL JOURNEY TO A SOBER LIFE.**

Develop and maintain LifeRing's Visibility Initiative to inform planning and decision-making, to effectively organize and distribute LifeRing's sobriety resources, and to reach the people who need us.

- Know the people who need LifeRing.
- Recognize and acknowledge the need for LifeRing's programs.
- Create comprehensive communications models.
- Maintain a strong, recognizable and meaningful brand.
- Enhance LifeRing's credibility.
- Design effective messages.
- Capitalize on creativity, adaptability and choice.
- Develop templates, models, and guidance for quality products.
- Evaluate the contribution of visibility to LifeRing's goals.

**OFFER A DIVERSE ARRAY OF EFFECTIVE RESOURCES, SELF-HELP OPTIONS, AND SUPPORT OPPORTUNITIES TO PEOPLE THROUGHOUT ALL THE STAGES OF SOBRIETY.**

Develop and maintain LifeRing's Sobriety Resources Initiative to provide comprehensive and diverse program choices for the people LifeRing serves.

- Expand the number and geographic reach of LifeRing meetings.
- Welcome more people to LifeRing meetings.
- Enhance the quality of content in LifeRing meetings.
- Encourage referrals to LifeRing meetings.
- Create opportunities to connect those seeking individual support.
- Offer sober social opportunities.
- Develop LifeRing's family and friends program.
- Develop an effective system of referrals to external resources.
- Create partnerships to benefit LifeRing support.
- Involve volunteers.
- Inspire convenors.
- Involve the recovery community and treatment professionals.
- Engage communities in LifeRing's efforts.
- Develop LifeRing's Annual Meeting.
- Create a rich, vibrant and ever-changing presence on the world wide web.
- Evaluate the contribution of sobriety resources to LifeRing's goals.

**PROVIDE EVIDENCE THAT PEOPLE ESCAPE ADDICTION -- AND CREATE HAPPY AND MEANINGFUL SOBER LIVES -- BY PARTICIPATING IN LIFERING.**

Develop LifeRing's Progress Initiative by establishing and maintaining credible evidence-based processes to monitor and evaluate LifeRing's measurable achievements.

- Conduct a thorough investigation of existing external indicators and internal performance metrics to measure achievement of objectives.
- Establish a periodic review process to identify and incorporate new external indicators and internal performance metrics.
- Develop new indicators and metrics by defining processes and methods for measuring change within the organization, demographic changes within membership and potential membership, and changes in member attitudes and behavior.
- Establish evidence-based approaches.
- Develop and implement a periodic LifeRing Membership Survey.
- Summarize relevant indicators and develop the LifeRing Progress Evaluation Framework to detail a process, procedures, timeline and benchmarks that incorporate updated indicator data and evaluate progress for each objective.
- Develop an online LifeRing Progress Dashboard to monitor and evaluate progress.
- Maintain a template and processes to produce the LifeRing Annual Report.

# PROCESS

## 1 | DEFINE

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- Explore planning theory and select appropriate models.
- Design planning processes.
- Create planning framework.
- Set planning schedule.
- Formally adopt interim planning framework and rationale.
- Appoint planning coordinator.
- Establish communication channels, archiving and access methods.


## 2 | DISCOVER

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- Conduct initial outreach activities.
- Collect stories, conduct interviews, create dialogue.

## 3 | DESIGN

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- Collect potential actions from current activity, archival research, and external resources.
  - Elicit ideas and insights from members.
  - Research, refine and structure emerging ideas and insights.
  - Detail potential actions for the organization.
  - Structure actions within a consistent framework of goals and objectives.
  - Provide chances to interpret, value and negotiate knowledge from data.
  - Summarize emerging values and aspirations to serve as foundations.
  - Provide opportunities for members to participate in iterative revision.

## 4 | DREAM

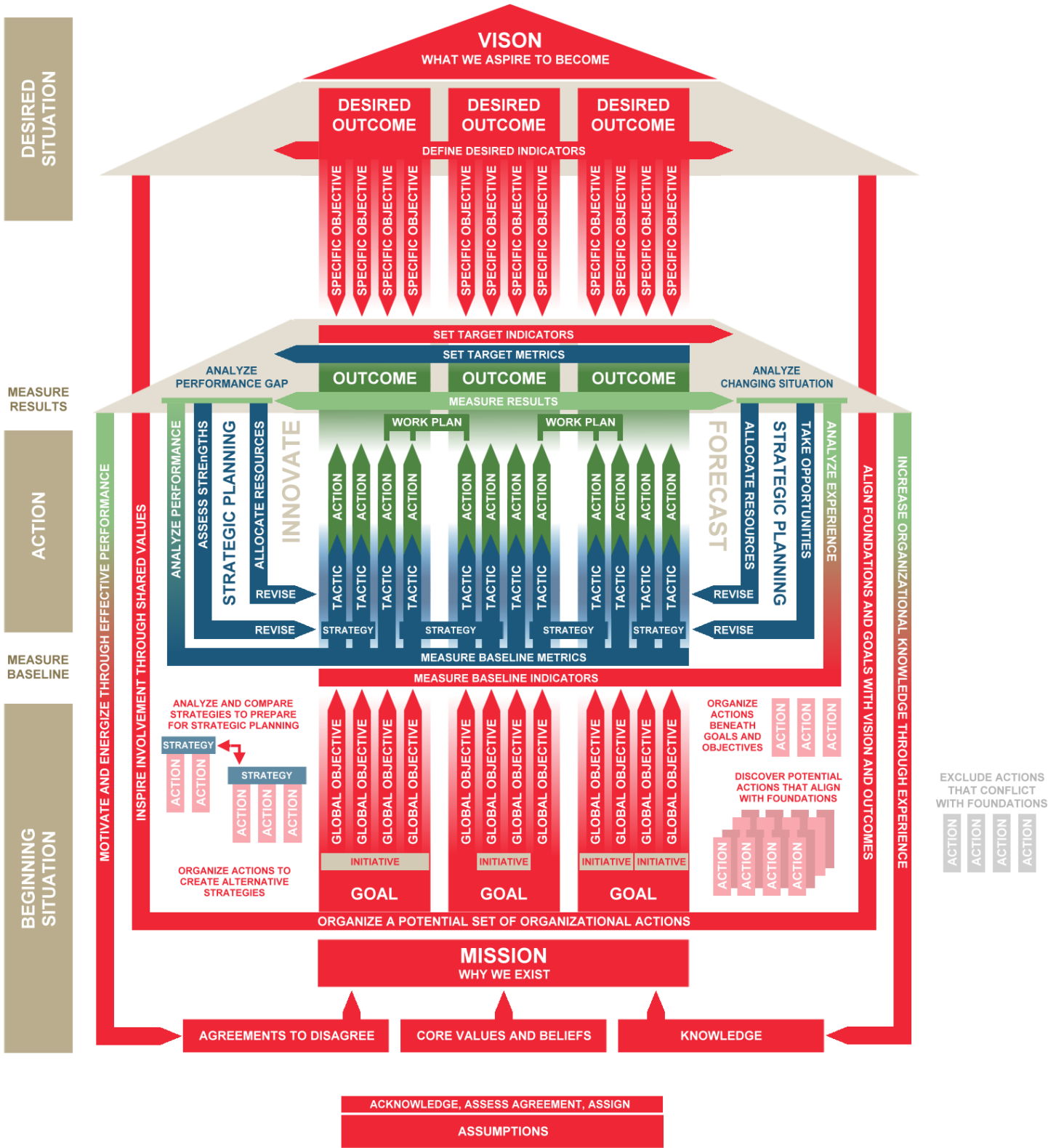
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- Examine the purpose of the organization today.
- Envision the organization's future.
- Explore alignment between emerging values and vision.
- Elaborate desired situations and forecast trends.

## 5 | DESTINY

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- Develop and analyze alternatives.
- Develop metrics.
- Develop indicators.
- Draft alternative specific objectives.
- Create a progress dashboard.
- Explore alternative methods, processes, and points of view.
- Draft strategic and tactical alternatives for review.
- Analyze potential scenarios.
- Draft planning documents.
- Adopt final long-range plan.



# ANNUAL PROCESS DESCRIPTIONS

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## PLANNING FRAMEWORK ADOPTION

During the congress portion of the 2011 annual meeting, LifeRing's Board of Directors will consider whether the Planning Framework should be adopted and, if so, appoint a planning coordinator.

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## PUBLIC RELEASE OF THE PLANNING FRAMEWORK

Following formal adoption of the planning framework, a description of the planning process will be posted to the web site, regional web sites, forum, ning, chat, and the three major yahoo groups LifeRingBOD, LSRSAFE and LSRMAIL.

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## PUBLICATION OF THE PLANNING FRAMEWORK

As part of the public release, the planning framework and related documents will be posted, and channels for communication established.

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## MONTH TO MONTH PLANNING PROCESS

Following formal adoption of the planning framework, the framework will be posted online and the monthly cycle of planning activities will begin immediately.

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## ADVISORY GROUP

The planning coordinator will establish a small advisory group of individuals who are willing to commit at least five hours per month to planning review and who have specific expertise or experience in planning.

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## INDIVIDUAL ADVISORS

The planning coordinator will rely on individuals to consider key elements of the planning prior to public release, in order to receive feedback regarding content any that may be sensitive. Who is contacted in this regard will vary throughout the year, depending on need and the individual expertise of the advisors.

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## REVIEW OF THE LONG RANGE PLAN

All interested parties will have the opportunity to review and comment on a draft Long Range Plan beginning March 1, 2012. Changes will be made to the draft plan through April 30, 2012.

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## STRATEGY DEVELOPMENT

Beginning March 1, 2012, a separate draft Strategic Planning Framework will be published for review. The strategic framework will present alternatives for action, and begin the formal analysis of those alternatives.

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## LEADERSHIP DEVELOPMENT

Beginning April 1, 2012, the LifeRing Board of Directors will be engaged directly to consider board governance and leadership areas of the long range plan.

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## PLANNING DEVELOPMENT

On May 1, 2012, the final versions of the draft Long Range Plan and the draft Strategic Planning Framework will be published for review.

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## LONG RANGE PLAN ADOPTION

During the congress portion of the 2012 annual meeting, LifeRing's Board of Directors will consider whether the Long Range Plan should be adopted and incorporate any required changes.

# 2011

MONTH	INITIATIVE									
JUNE	Planning									
JULY	Foundations									
AUGUST		Operations								
SEPTEMBER			Volunteers							
OCTOBER					Funding					
NOVEMBER							Knowledge			
DECEMBER									Visibility	

# 2012

JANUARY	Sobriety Resources									
FEBRUARY		Progress								
MARCH			Strategies							
APRIL 2012				Leadership						
MAY 2012						Planning				

# MONTH TO MONTH PROCESS DESCRIPTIONS

The following processes will recur during each month of the year of planning, according to the schedule posted on the following pages. Each month will focus on a separate planning initiative, although changes to the entire draft framework and plan may occur at any time.

## FRAMING DOCUMENTATION

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At the beginning of each planning month, a set of documents will be posted online for review. These will include the interim framework for planning processes related to the subject matter that is designated for that month. The documents will be accessible to anyone having the web address.

## WEB LINKAGE

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A dedicated web page will be devoted to the subject matter for each planning month, allowing linked accessibility to documents, resources, and the planning framework from a single online location.

## NOTIFICATIONS

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Once documents have been posted, notification of that month's planning calendar will be made to the web site, regional web sites, forum, ning, chat, and the major yahoo groups LifeRingBOD, LSRSAFE, LSRMAIL, liferingconvenor, and lsr-onlineconvenors.

## SCANS

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Once each month members will be invited to contribute resources related to the subject matter designated for that month, including links, articles, reports, books, and data. These will serve to inform the planning activities for that month. The hour-long chat discussion will consist of a 20 minute brainstorm to collect ideas for "what we need to know", a 20 minute effort to actually collect those resources, and a 20 minute categorization and listing of materials which remain to be collected. Scanning activities will continue throughout the month, with resources added as they are found.

## HISTORICAL RESEARCH

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LifeRing's archives will be mined for ideas, data and resources. Archival research will include perusal of meeting minutes, convenor lists, forums, yahoo groups, printed publications and reports.

## SURVEYS

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Short online surveys covering topics of interest related to the subject matter designated for the month will be posted at the time of the initial workshop. Surveys will not be modified within the month, but additional questions may be posted in the survey for the following month, or in follow-up surveys in the same month. Multiple mini-surveys may be used. Surveys will not commence prior to September 1, 2011.

## WORKSHOPS

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Once each month a planning workshop will be held via skype to familiarize participants with the overall planning process, the subject matter designated for that month, the related framing documents, and the resources supporting the process. Volunteers with experience in the area will be invited to present ten minute summaries. The last ten minutes of the workshop will be devoted to proposing any initial changes to the framing documents.

## BRAINSTORMS

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Three one hour brainstorming sessions will be held each month via chat and skype to encourage LifeRing members to contribute ideas and suggest opportunities. Each hour will consist of a 10 minute introduction to the process, a 40 minute brainstorming session, and a 10 minute discussion of how best to categorize and refer to the ideas and suggestions.

## YAHOO GROUP FOR PLANNING

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A new yahoo group will also be created to centralize planning discussion threads:  
<http://health.groups.yahoo.com/group/LifeRingPlanningGroup/>

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## **SYNCHRONOUS ONLINE DISCUSSIONS**

Three one hour discussion sessions will be held each month via chat and skype to review and comment on the subject work accomplished that month, and to integrate the data received via the brainstorming and focus group sessions into the planning framework. The hour will commence with a 10 minute review of categorized contributions, followed by a 30 minute discussion agenda, and concluding with a 10 minute determination of levels of consensus and outstanding issues.

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## **ASYNCHRONOUS ONLINE DISCUSSIONS**

New planning threads will be established for the month's subject matter on the LifeRing web site, regional web sites, forum, ning, chat, and the major yahoo groups LifeRingBOD, LSRSAFE, LSRMAIL, liferingconvenor, and lsr-onlineconvenors. The threads will be monitored throughout the month, and contributions will be excerpted to the developing plan.

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## **FOCUS GROUPS**

Three one hour focus groups will be held each month via chat and skype to respond to five or six specific open-ended questions prepared for the month's subject matter. Two focus groups will be invited to participate; one will be open to any member. Additional focus groups may be held to elicit opinions and ideas from referrer groups and professionals.

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## **FACE TO FACE**

Face to face planning sessions will consist of half-day workshops that include a brainstorming session, situation scan, and discussion. The face to face sessions listed on the planning schedule are a "best case scenario" and will occur only if someone steps up to fund the trip or if someone can be trained to conduct the session locally. However, face to face sessions serve in part to ensure that LifeRing's regions are well represented geographically in the planning process, so if a face to face session cannot be managed for a region, an online half-day workshop focusing on regional issues will be conducted instead.

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## **CONVENOR INTERVIEWS**

Geographically remote face to face convenors confront some of the greatest challenges to the organization. Regular direct telephone interviews will be conducted with convenors to ensure their participation. In addition, regular threads will be posted to liferingconvenor, and lsr-onlineconvenors yahoo groups.

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## **INDIVIDUAL INTERVIEWS**

A great deal of valuable information is held by individuals who have been a part of the LifeRing for a significant period, have pioneered organizational activities, or who have conducted ongoing operations. Those individuals may be selected for one on one interviews designed to document their insights. Similarly, some aspects of the plan will relate to external resources such as treatment professionals, people in the court and correctional system, community organizers and the like. When information is lacking in those areas, one on one interviews may be conducted.

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## **REVIEW**

At the end of each planning month, a revised set of documents will be posted online for review. From that point forward, contributions to that portion of the plan must be emailed directly to the planning coordinator or noted to the Yahoo group for LifeRing planning. The posted review documents will continue to be updated through the end of the planning year, and will serve as the most up-to-date documentation of the plan as a whole. The documents will be accessible to anyone having the web address.

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## **MONTHLY PLANNING STATUS REPORT**

Once a month, a four page status report will be prepared which may be emailed to those who request it, and mailed to individuals without access to email. Upon request to the service center or planning coordinator, email addresses and postal addresses will be added to this planning mailing list.

# PLANNING CALENDAR

## MONTH | INITIATIVE

JUNE 2011 | **Planning**

JULY 2011 | **Foundations**

AUGUST 2011 | **Operations**

SEPTEMBER 2011 | **Volunteers**

OCTOBER 2011 | **Funding**

NOVEMBER 2011 | **Knowledge**

DECEMBER 2011 | **Visibility**

JANUARY 2012 | **Sobriety Resources**

FEBRUARY 2012 | **Progress**

MARCH 2012 | **Strategies**

APRIL 2012 | **Leadership**

MAY 2012 | **Planning**

5 PM	Workshops Skype and Chat
5 PM, 9 PM	Environmental Scan Chat
5 PM, 9 PM	Brainstorm Chat
6 AM	Brainstorm Skype
5 PM, 9 PM	Focus Group Chat
6 AM	Focus Group Skype
5 PM, 9 PM	Discussion Chat
6 AM	Discussion Skype
	Remote Face to Face Review

The face to face planning sessions listed below are a “best case scenario” and will occur only if someone steps up to fund the trip or if someone can be trained to conduct the session locally. Related events are listed in order to try to maximize resources, and to indicate why a session is proposed for a particular region on a specific date.

	DATE	REGION	CITY	RELATED EVENT
FUNDED	June 4	<b>Pacific West</b>	Oakland, California	
FUNDED	July 23	<b>Pacific West</b>	Modesto, California	
	August 27	<b>Mountain</b>	Denver, Colorado	
	September 10	<b>Mideast</b>	Washington, DC	Recovery Month Kickoff
	September 17	<b>Pacific West</b>	San Diego, California	NCAD
FUNDED	October 2	<b>Pacific West</b>	Sacramento, California	CAADAC
	October 29	<b>Mideast</b>	Arlington, Virginia	Addictions 2011
	November 5	<b>Hudson/New England</b>	Brooklyn, New York	ASAP
FUNDED	November 26	<b>Northwest</b>	Eugene, Oregon	
FUNDED	December 31	<b>Southwest</b>	San Antonio, Texas	
	January 28	<b>Europe</b>	Dublin, Ireland	
	February 25	<b>Southeast</b>	Tampa, Florida	
	March 3	<b>Canada</b>	Vancouver, Canada	ASAP BC
	March 31	<b>Great Lakes</b>	Chicago, Illinois	
	April 1	<b>Mideast</b>	Washington, DC	Recovery Month Planning
	April 21	<b>Southeast</b>	Atlanta, Georgia	ASAM
	May 17	<b>Southwest</b>	Phoenix, Arizona	NAATP

**June | Planning**

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

**July | Foundations**

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

**August | Operations**

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**September | Volunteers**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

**October | Funding**

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

**November | Knowledge**

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**December | Visibility**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**January | Sobriety Resources**

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1			

**February | Progress**

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			

**March | Strategies**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
30	31					

**April | Leadership**

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

**May | Planning**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

# COMMUNICATION TOOLS

**Whiteboard** | Skrbl | <http://www.skrbl.com/>

**Integrated Voice and Instant Message Package** | Skype | <http://skype.com>

**Screenshot Capture** | Snag It | <http://www.techsmith.com/snagit.asp>

**Conference Calls** | FreeConferenceCall | <http://www.FreeConferenceCall.com>

**Chat** | LifeRing Chat Room | <http://lifering.org/chat-room>

# ARCHIVING

**Static Published Documents and Images** | PDF on LifeRing Planning Web Site

**Draft Documents under Revision** | Framework Wiki or Google Apps

**Audio Recording** | TotalRecorder | <http://www.totalrecorder.com/index.htm>

**Slide Shows and Powerpoint** | SlideShare | <http://www.slideshare.net/>

**Video Recording** | YouTube | [www.youtube.com/](http://www.youtube.com/)

**Photographs** | Flickr | <http://www.flickr.com/>