

## Unity, Safety and Wellbeing: Guidance for Meetings

The 'Unity, Safety and Wellbeing' reading, which was put together by C.A. London Area to help its meetings, says:

*"In C.A., we care about the safety and wellbeing of our fellows. Everybody has the right to feel safe and secure in and around our meetings. It is imperative that each member can find recovery in a safe environment and that the unity of the group is not harmed. Bullying, harassment or unwanted sexual advances do not have to be tolerated. If anyone feels unsafe, or feels another member may be unsafe, please speak to a member of the committee or the District Service Committee. Please be assured that you will receive support."*

Unity, safety and wellbeing<sup>1</sup> are the responsibility of all members, individually and collectively. Our first tradition states that "Our common welfare should come first; personal recovery depends upon C.A. unity." The best way to promote healthy, functional meetings is to have strong committees that are fully informed about the 12 Traditions, hold regular group consciences and conduct group inventory, and stand together when facing difficult situations.

There are times, however, when our unity is challenged. While we aim to be loving, compassionate and tolerant to all, members can fall out; or individual members can behave in ways that affect the general wellbeing of the group or its primary purpose (Tradition Five: "Each group has but one primary purpose – to carry its message to the addict who still suffers").

### Promoting unity, safety and wellbeing

The answer to nearly all challenges faced by groups lies in the 12 Traditions. After all, they came about because of difficulties experienced by the original 12-Step groups.

So, what can groups do if members fall out; or an individual member repeatedly disrupts a meeting or bullies, harasses or makes unwanted sexual advances to another member, or behaves in a manner which compromises a meeting's primary purpose?

It is not for London Area to tell groups how to manage their meetings and specific guidance may not cover all situations. We can, however, offer some suggestions to guide members and committees.

We urge members to be loving, understanding and compassionate to others in the fellowship who may be struggling with behavioural issues or challenging defects of character. All of us may have struggled to fit in at times and our behaviours may not have been acceptable to others. Our unity is best served by finding the good and potential to grow in others, rather than trying to control their behaviour.

### Disrupting meetings

If a member is under the influence and disrupting a meeting or unable to follow meeting etiquette, the best solution is often for a senior member to take them outside and talk to them and try to carry a message of recovery person-to-person.

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<sup>1</sup> In this context, safety refers to the safety of members from harm by other members. However, please note that English and Welsh law requires that any person with an official role in a charity has specific responsibilities for health and safety, preventing bullying and harassment, and the safeguarding of Vulnerable Adults at meetings and events that they represent. All GSRs and Area Service Committee members are considered to be members of CA London (the registered Charitable Incorporated Organisation), and so are legally responsible for safety and security at their meetings and events. The London Area Charity Trustees Committee has overall responsibility for safety and security, and provides general guidance on all of the issues listed here.

If the member refuses to cooperate and continues to disrupt the meeting or is upsetting other members, it is the responsibility of the committee to keep the meeting safe. The Secretary, GSR or any member of the committee can pause the meeting and ask members to behave respectfully or to ask for the 'Unity, Safety and Wellbeing' reading to be read out again.

If the problem persists, the member who is disrupting the meeting can be asked to leave. This may seem harsh and unfair, particularly if the member seems unwell or is otherwise struggling. What about Tradition Three ("The only requirement for membership is a desire to stop using cocaine and all other mind-altering substances")?

Any request to leave is based on the group's common welfare (Tradition One) and primary purpose (Tradition Five). The request should be reasonable and can only apply to that meeting on that particular day – we cannot bar a member from a meeting on an ongoing basis or from C.A. as a whole.

If the member who is asked to leave is known to the committee, a kind phone call or text in the following days can often start to heal any anger or resentment that may have arisen. This, however, is a matter for individual members and they must be guided by their conscience, Higher Power and need to feel safe.

Should you be unable to resolve such a situation and it reoccurs regularly, seek guidance from your District Service Committee. The District Chair, Unity Chair and/or DSR(s) can often resolve such issues by helping members to understand the 12 Traditions.

### **Dealing with complaints**

In the reading at the start of this guidance, it says: *"If anyone feels unsafe, or feels another member may be unsafe, please speak to a member of the committee or the District Service Committee. Please be assured that you will receive support."*

If a Group Service Committee (or District Service Committee) member receives such a complaint, we urge you to remain open-minded and not make assumptions or rush to judgement. It is better if two committee members or more are present when hearing a complaint to provide a safe environment.

In the first instance, try to ensure that the person making the complaint is listened to and feels heard. This does not mean taking sides or promising outcomes. Ask if there are witnesses who can corroborate their version of events. However, the absence of a witness does not mean that the complaint should be ignored. Ask if the person making the complaint wishes to remain anonymous. Either way, treat their complaint with discretion and don't talk about it to other members (other than the committee) or people outside the fellowship. Ask what the person making the complaint would like to happen next and what their ideal outcome would be.

Most such complaints can be dealt with by the Group Service Committee, through tact, discretion and considered action. We urge you to act with love, tolerance and compassion, but also to ensure that members feel safe at your meeting by challenging inappropriate behaviour. If a committee feels unable to resolve a complaint, get permission from the person who has complained to seek guidance from your district or London Area, but again be discreet and if requested respect the anonymity of the person making the complaint.

If, however, the complaint is more serious and you believe a crime may have been committed, encourage the person who has allegedly been harmed to report the matter to the police (see below).

## **If a crime is committed**

If a disruptive member is less inclined to be reasonable and commits a crime, such as assault, sexual abuse, theft or vandalism, it is OK to call the police or subsequently report the alleged criminal behaviour. Again, this may not sit well with individual members, but the safety and wellbeing of all members is important. Similarly, while anonymity is a cornerstone of our traditions, it doesn't allow members to commit crimes without accountability. This includes threats of violence.

In simple terms, if a C.A. member believes a crime may have been committed, they should consider taking the following action(s), as appropriate:

- Preserve any evidence, including the names and phone numbers of any witnesses
- Report their concerns to the Secretary, GSR or another committee member
- Call the police by dialling 999 in an emergency or 101 to report a crime or criminal offence that is not an emergency, or subsequently report a crime in person by visiting a police station.

If the suspected crime relates to a Vulnerable Adult, the police or the Local Authority Adult Social Care team are the appropriate people to be notified.<sup>2</sup>

## **'When Trust is Lost'**

In specific situations, the disruption may come from a committee member, which can create additional challenges as they have been elected by the group as a trusted servant. For example, it may be suspected that a group treasurer may be misusing the funds. Such problems have arisen before and the fellowship has clear guidelines about financial issues and handling money at all levels (see the 'Financial Guidelines for Groups, Districts and Areas', which can be found on ca.org). In the first instance, it is the responsibility of the meeting as a whole to ensure that it takes seriously its financial affairs and ensures the guidelines are followed.

There may be situations, however, where a trusted servant allegedly breaches the trust placed in them. Our World Trustees have suggested a process for dealing with such situations, which is outlined in the article 'When Trust is Lost' that first appeared in *The NewsGram*, the CA newsletter. It is a thorough document that sets out a clear process for handling such situations. This article has been approved by London Area and is reproduced at the end of this document.

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We hope you never have need for any of this guidance, but it is better that members, particularly those who do service in meetings, feel informed and empowered to keep their meetings safe and promote unity in C.A. The important point is that you are not alone and can ask for help.

If you need more support or guidance, there are plenty of people in the fellowship with experience of resolving disputes or difficult situations in meetings or other service environments. In the first instance, we suggest asking your District Service Committee for help, through either the Chair, Unity Chair or DSR(s). Beyond this, the Chair, Vice-Chair, Unity Chair or Delegates at London Area can offer guidance, suggestions or moral support to your meeting's committee.

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<sup>2</sup> Please note that 'Vulnerable Adult' is a legal term and does not generally apply to all newcomers or addicts who are struggling ('A person who is 18 years of age or over, and who is or may be in need of community care services by reason of mental or other disability, age or illness and who is or may be unable to take care of him/herself, or unable to protect him/herself against significant harm or serious exploitation').

## **APPENDIX 1 - When Trust is Lost and Keeping What We Have**

### **An article the World Service Board of Trustees (Approved by WSC in August 2006 and CA London Area in May 2020)**

The issue of the appropriate response of the CA fellowship and respective service boards (districts and/or areas) when trust in a member is lost due to some actions or inactions of the member who is in a service position unfortunately occurs upon occasion within our CA fellowship. Many times, this concern stems from issues around money, while less often the concern relates to issues around performance of service obligations, behavior issues, and even loss of sobriety.

A careful analysis of this broad issue leads to the conclusion that the matter really has two segments which each need to be explored. The first segment is preventative in nature and establishes some guide- lines related to money handling and also service standards and behaviors. The second segment is a suggestion as to how a service body might respond after there is a breach of trust, theft, behavior issues, or an even a dispute between service members.

#### **Preventative Measures and Guidelines**

It is our collective experience that when certain preventative measures and guidelines are in place, there is less likelihood that problems might arise or perhaps remain within any level of the CA service structure

#### **Preventative Measures Around Money Handling**

Theft and problems around CA funds can be avoided by consistently and diligently following responsible financial practices and principles. The angst caused when one of our fellows steals from the fellowship or misuses funds, as well as the loss of those funds that might have gone to help the still- suffering addict, point clearly to our responsibility to do everything we can to prevent these types of problems in the first place.

Most of these challenges have occurred when preventative measures are not in place or are in place but not fully followed. Sometimes we have not wanted to use these preventative measures because we might know the treasurer or other servant person- ally, or we might believe we would insult that person by asking that the measures be followed, or that the measures may be too cumbersome or troublesome to fully implement. However, our experience is that the very best preventative measure against any type of problem is to remove all chances to have a problem in the first place. Eliminating the opportunity to steal or misappropriate funds may be the best safeguard our fellowship has.

The preventative measures aspect of this matter has two parts, actually. The first deals with how we select trusted servants who are responsible for the management and handling of funds. The second part relates to the checks and balances necessary in these types of matters.

Concepts 9, 10 and 11 are related at some levels to responsible financial management by the respective service bodies at all service levels. In keeping with the spiritual principles of these concepts, guide- lines related to money handling should be carefully developed and followed. These would comprise any of a number of appropriate checks and balances, which might include and/or all of the following: two signatories on the bank account, not having the treasurer be a signatory, duplicate copies of all bank statements being sent to the treasurer and service body chair, yearly audit of all accounts, possibly only writing checks at business meetings with someone besides the

treasurer holding the check book in the interim, monthly treasurer reports, and regular reconciliation of original bank statements. Note that many of these suggestions are further detailed in the CA World Service Manual - see 2006 Manual page 14. Further, the World Service Conference Finance Committee has developed Financial Guidelines for CA, which set forth additional preventative suggestions.

There is a wise saying which provides that an addict alone with fellowship money is in bad company. Hence, it is crucial that all money handling procedures at all levels be monitored by at least two people: two people count receipts; two people make the bank deposits (immediately if at all possible, not the next day); two people reconcile the original bank statements; and two people are always present when funds are disbursed and/or when cash proceeds are involved. Note please that other fellowship assets such as convention merchandise, literature, memorabilia, or office equipment should be treated similarly.

At all levels of our service structure, we need to make sure that money handling guidelines are in place, preferably in writing or at least locatable in the service body's minutes. These guidelines should reference what is expected of the trusted servants in terms of money handling procedures, audit procedures, accounting expectations, checks and balances and the like. The service body might in fact include a statement that theft, misappropriation, or misuse of fellowship funds will not be tolerated at any level and might even consider the process that the service body might follow if such an event occurs. It follows that servants who are aware of these guidelines in their entirety are most likely to follow them and be- have in a responsible manner.

### **Other Clearly Articulated Expectations of What the Service Body Expects of the Trusted Servant**

It is often hard to judge the performance of a trusted servant where there are no clear guidelines of how the servant is expected to serve. Accordingly, it is suggested that the service body implement standards for performance by trusted servants. These could complement and supplement the service body's financial and money-handling guidelines.

These performance standards could include those referenced in the CA World Service Manual and those adopted as bylaws of the service body after participation and group conscience including all trusted servants to be affected by the standards. These standards might need to be updated from time to time as service positions change and evolve. Fortunately, there are now several service bodies within our fellowship that have such standards in place and are more than willing to share their experience, strength and hope if asked. Three very common standards relate to loss of sobriety, behavioral challenges and attendance (or the lack thereof) by the trusted servant at service body meetings.

### **Selection of Trusted Servants**

Bill W. wrote an article which was published in the April 1959 edition of the Grapevine entitled "Leadership in AA: Ever a Vital Need." Other writings by Bill and others in 1961, 1966 and 1972 helped to further refine this initial writing. Bill's initial article is inserted directly into the Twelve Concepts for World Service in Concept 9 which provides in part: "Good service leaders, together with sound and appropriate methods of choosing them, are at all levels indispensable for our future functioning and safety..." So first, we must describe what the trusted servant's duties and responsibilities will be; then we must develop a set of requirements both in terms of sobriety as well as applicable service and real-life experiences that match the duties and responsibilities. The

writings seem to emphasize the needs of the service body which is tasked with making selections after being fully informed of the strengths and weaknesses of the respective candidates. At a minimum, a service resume should be created and circulated; additional specific questions can be asked as a supplement to the service resume or during an interview, if one is held.

In addition to the tangible qualifications of the possible trusted servant, there are some “intangibles” to consider. One is whether we can “trust” the trusted servant. Another is what kind of a service leader the person might be. As Bill stated:

“Good leadership originates plans, policies, and ideas for the improvement of our Fellowship and its services. But in new and important matters, it will nevertheless consult widely before taking decisions and actions. Good leadership will also remember that a fine plan or idea can come from anybody, anywhere. Consequently, good leadership will often discard its own cherished plans for others that are better, and it will give credit to the source.... Good leadership never passes the buck. Once assured that it has, or can obtain, sufficient general backing, it freely takes decisions and puts them into action forthwith, provided of course that such actions be within the framework of its defined authority and responsibility.”

### **Response When Trust is Lost**

If the safeguards related to money are followed and/or the behavioral and other expectations of the trusted servant are spelled out and then followed, it makes it nearly impossible for problems to still occur. Occasionally, though, even if these safeguards and expectations are complied with, there may be situations which cause trust in a particular trusted servant to be lost. When these unfortunately occur, the service body and members of the fellowship are often faced with the dilemma of how to proceed. This is another reason why clear standards and guidelines are helpful, as they establish a standard to compare to when potentially harmful situations arise. Other factors to consider are: a sliding scale based upon the severity of the action; also the service body is encouraged to look at the levels/efforts of restitution and remorse by the person involved; another issue is whether the action is an isolated incident or part of a pattern.

In any event, when these types of problems occur, we must ask whether all financial guidelines and procedures were followed or, if applicable, whether the expectations which were set forth were reasonable for the trusted servants and whether they were in fact met. If either answer is no, the service body should bear part of the responsibility for the problem and the existing procedures and safeguards should be reviewed and modified appropriately.

If, however, the service body can answer that its guidelines were followed completely and that everything possible was done to prevent a problem with money or that its expectations of the servant were clear, set forth and understood by the servant and the result is that there still are missing funds, theft, misbehavior, or breaches of the service body’s guidelines, then great care must be taken as to how to proceed. When any or a combination of these actions occur there is often a mixture of reactions from the fellowship, ranging from ‘forgive and forget, after all we are all addicts and this is how our disease manifests itself and we do not want to run the servant out of the rooms of recovery into a possible relapse,’ to something like ‘let’s sue or prosecute.’

Whatever the reaction is, we need to be mindful that we are charged with first finding out exactly what happened and why. We do not want to overreact, nor do we want to insufficiently react.

Our program of recovery affords all members of our fellowship the chance to behave responsibly in these types of difficult situations, to face our fellows and make amends. This process often starts the healing for the entire fellowship.

However, this is not to say that theft, misuse of funds, other problems with money, loss of sobriety, misbehavior, or failure to fully meet clearly articulated service commitments should be taken lightly or that the service body should sit idly by waiting for the servant to make amends, change and/or apologize. The service body should instead encourage a review process which is responsible, spiritual and fair to all involved. In any event, we are always mindful of our Tradition of placing principles before personalities, especially in these types of situations

If it becomes clear that funds are missing or that a servant has breached his or her duties as clearly set forth in the applicable service guidelines, the service body should make every effort to contact the individual to schedule a meeting where the servant is fully informed of the date, time and location of the meeting and that at such meeting, the servant will be provided the chance to present his or her version of the events. At such a meeting, it is recommended that the format allow adequate time for all involved to express their respective feelings, concerns and solutions. This allows all in attendance to provide their input and may afford a 'cooling off period' to occur. Thereafter, a short break is suggested to allow the participants the chance to connect with their own Higher Powers, focusing on spiritual principles and solutions, before reconvening to conscience on the next course of action.

In these instances, the servant is encouraged to present his/her side of the matter and to find a solution for both the servant and the particular service body. Only if there is no solution should any of the other possible options be explored. Again, it might also depend on whether there are guidelines in place or detailed expectations which have not been followed to an acceptable level. If these items are in place by the service body, the inquiry and solution might be easier. If not, perhaps more difficult.

If the servant appears at such a meeting and admits to the theft, misuse of funds or failure to follow the financial guidelines of the service body and agrees to pay the funds back, a restitution agreement can be created which might include regular periodic payments in such amounts and in such intervals as acceptable to all involved. Most such agreements specify a weekly or monthly payment until all funds are repaid. Our experience indicates that such agreements need to be written, signed by both the member and a trusted servant of the service body, and perhaps drafted with the advice of counsel if possible. The restitution agreement should have a provision which states that if the agreement is not followed, the service body reserves the right to take whatever legal actions it may be entitled to both under the agreement as well as under the underlying theft statutes applicable to the jurisdiction where the service body is located. A periodic report about the status of the restitution agreement should be made to the service body until the agreement is paid or satisfied in full.

If the issues are around loss of sobriety, misbehavior, or failure to comply with the guidelines in place within the service body, then the inquiry turns to appropriate consequences. These might range from removal from that service position to something less than removal, depending on the

circumstance and contriteness of the servant. We are mindful here of two of the warranties within the Twelfth Concept: that no action by the service body ever be personally punitive or an incitement to public controversy; and that all actions of the service body should be democratic in thought and in action.

A sample provision to be placed in the service body's bylaws or guidelines might include the following:

### **Problems of Misbehavior, Loss of Sobriety, or Misuse of Fellowship Funds**

Response by the service body when there are questions about the trusted servant's misbehavior, loss of sobriety, failure to follow other guidelines of the service body, or where there are accusations of theft, misuse of fellowship funds, and/or mishandling of such funds.

The following actions will lead to an investigation and possible further sanctions as warranted by the service body.

**A. Loss of Sobriety:** Complete abstinence is a requirement! Anything other than complete abstinence constitutes an automatic resignation. Further requirements are stipulated under each position's description.

**B. Misbehavior:** It would be virtually impossible to contemplate all possible events of wrongful behavior by the trusted servants. Wrongful behavior would include, but not be limited to, verbal abuse or physical violence directed toward a fellow trusted servant or CA member. Incidents of wrongful behavior should be carefully considered on a case-by-case basis.

**C. Misuse of Fellowship Funds:** The Eleventh Concept establishes that the sole absolute priority for the use of CA funds is to carry the message to the addict who still suffers. The 12 Concepts give the service body a mandate from the CA groups that calls for total fiscal accountability. With this in mind, any misuse of funds by trusted servants cannot be tolerated. Definition: "Misuse of funds" includes, but is not limited to, theft, embezzlement, or use of funds for any purpose not expressly authorized by the applicable service committee or subcommittee. This includes theft of cash, checks, any financial instrument (i.e., refunds from vendors to the CA. fellowship), or asset (i.e., equipment, supplies or inventory).

### **1. Interim Action - Suspension**

a. Should any trusted servant be suspected to have misappropriated or misused fellowship funds, to have lost sobriety, or been accused of misbehavior, the members of the executive committee of the service body which initially put the trusted servant in place will contact each other, in person or by phone, to discuss and begin an investigation of the allegations made. Upon outcome of the initial investigation, the Executive Body may vote to immediately "suspend" the member(s) involved from their applicable service position(s). Suspension in this instance is not disciplinary action; it is a pause in active service to allow time for further investigation of the incident.

b. A suspended trusted servant may no longer represent him/herself to the fellowship or service body as the holder of that trusted servant position. Additionally, a member, upon notification of



being suspended, may not be reimbursed for any service- related expenses incurred during the course of his/her suspension.

c. The presiding officer of the service body, immediately upon calling the next successive service body meeting to order, must report all interim sus- pension decisions made by the Executive body, fully disclosing the alleged misappropriation or misuse of funds, misbehavior or other wrongful actions, and name the individual(s) involved. Any member suspected of misappropriation or misuse of funds, or of any other wrongful acts, may exercise their Fifth and Tenth Concept rights to redress at this time.

d. The service body may discuss continuing the investigation or moving to action.

e. Any other member who participates in or who had knowledge (without notifying the committee) of the suspected misappropriation or misuse of funds or other wrongful behavior, shall be subject to the same actions taken against the suspected person(s).

## **2. Action - Reinstatement/Removal**

a. The service body may vote to reinstate the member(s). Upon reinstatement, said member's suspension will be lifted and he/she will resume his/her role as a full participant of the service body.

b. This matter can be brought to the applicable overseeing service body if the action occurred at a subcommittee level. If the service body votes to further investigate or to suspend a member, the subcommittee, if there is one, will report these actions to the applicable overseeing service body and ask for its guidance and recommendations. The suspected person may exercise their Fifth and Tenth Concept right to redress at this time at the overseeing body level. (Here, for example, if the action occurred at the Area H&I Committee, the Committee would have the right to bring the matter to the Area.) If the matter involved a trusted servant of the Area or District, the body which placed that servant in the service position shall have ultimate authority to act in such instance.

c. If the subcommittee or overseeing service body votes to remove the trusted servant with cause, said individual's participation within the service body is immediately terminated. Additionally, any member removed from office and/or committee by the service body for misappropriation or misuse of fellowship funds may not hold any District, Area or Regionally- elected position, or handle any fellowship funds of the Area, District or its subcommittees for a period of three (3) years.

## **3. Restitution**

a. A member removed from a service position for the misappropriation or misuse of fellowship funds may be subject to other sanctions by the service committee.

b. Members removed from office for the misappropriation or misuse of fellowship funds may, at the discretion of the service body, be asked to sign a promissory note and make restitution in lieu of prosecution.