

## Background to Policy on Bequests

At the 2007 World Service Conference, it was suggested that the limit on bequests be reviewed, while keeping within Al-Anon principles. A review of the current policy regarding bequests is a Goal and Objective within the Board of Trustees' Strategic Plan.

At the July 2007 Board meeting, the Finance Committee was appointed as a task force to further review the issue and bring forth recommended wording.

In framing this issue for the Policy Committee, the Finance Committee Chairperson presented the following background information:

The first printing of the Policy Digest in 1975, states that the WSO may accept a *one time* legacy from an Al-Anon member in any amount up to U.S. \$1000. In 1986 that amount was raised to U.S. \$5,000 and "(Contact the WSO for details)" was added as a last line to the policy. In 1992 the limit was raised to U.S. \$100,000 and in 2004 raised to ten percent of the total revenue of the WSO General Fund as identified in the previous year's audit; this remains our current policy.

Since the last revision of the Policy in 2004, members have contacted the WSO wishing to include Al-Anon in their estate plan and desiring to bequeath more than the maximum allowable amount, stating that they have no heirs and wish to give back to Al-Anon to the extent they desire. Additionally, some Conference members have questioned, "Why the limit?"

Under the direction of the Chairperson of the Board, in 2006 the Finance Committee began to discuss the issue of removing limits on bequests while maintaining the spiritual principle that keeps the World Service Office dependent on the groups for funding and not operating independently of them.

The Finance Committee presented their thoughts to the Board of Trustees at the July 2007 meeting. The Chairperson of the Board appointed the Finance Committee as a Thought Force to continue discussions and to possibly come forward with a proposal for consideration by the Policy Committee and the Board of Trustees.

The proposal would:

- Allow a one-time bequest to the WSO in any amount desired by the member so long as it is not earmarked.
- Report separately on the Financial Statements any amount that exceeds 10 percent of the total revenue of the WSO General Fund as identified in the previous year's audit.
- The World Service Conference would authorize the expenditure of these amounts. The Board of Trustees would then administer those expenditures with the Conference's guidance.
- The proposed policy gives the World Service Conference express oversight of these funds.

In Policy Committee discussion, one member noted that this proposal “presumes goodwill” and a high level of trust between the Board and the Conference; if the Conference will trust the Board to proceed with this proposal, the Board will trust the Conference to appropriately authorize the use of the funds. In its traditional role, the Conference has never had responsibility to specifically direct the use of funds.

\*The Motion passed by more than the required 2/3 vote at the 2008 WSC.

**In floor discussions at the 2008 WSC, Conference members included the following points regarding this Motion:**

**Pros:**

- The last time the WSO was fully self-supporting was 1952.
- The likelihood of receiving a large donation is minimal.
- The intent of the motion is that no entity will have control of the money. The motion contains checks and balances—any money above ten percent of the total revenue of the WSO General Fund as identified in the previous year’s audit would be identified for projects to be authorized by the WSC. The Board or its Executive Committee would then oversee the implementation of those projects. The staff would then implement the projects and report back to the Conference through the Board.
- The fellowship has benefited from the special projects and foreign trips funded by the Reserve Fund in the past.
- Our members don’t want to be restricted on how much they can give to Al-Anon Family Groups.
- Any member could give a million dollars to his/her group; it would be better for the fellowship to have the WSC decide what to do with that amount of money rather than a small group.
- The WSC can change the Policy, if it is later determined that the Policy was a mistake.

### Cons and responses (in italics):

- Is this Motion consistent with our principles especially Tradition Six? Does it divert us from our primary aim? Would discussions in Areas be just about money?
  - *This motion is about meeting the needs of members. The discussion should be about being in line with our spiritual principles. It'll only divert us if we allow it. Tradition Six is often misquoted and thus not understood. It says: "Our Family Groups ought never endorse, finance or lend our name to any outside enterprise, lest problems of money, property and prestige divert us from our primary spiritual aim. Although a separate entity, we should always co-operate with Alcoholics Anonymous." It's not about Al-Anon having money. It's about lending our name to outside enterprises to get money, property, or prestige. As long as what we take has no control over us and we don't merge ourselves with outside enterprises, we really maintain the spiritual idea of Tradition Seven—that we're self-supporting. We're not asking members, but allowing members to pay what they can.*
  
- Groups would feel that their contributions are no longer necessary to support Al-Anon as a whole. How solid would that policy remain on not using that money to support world services? I can envision not being able to fund daily stuff but having too much for special projects.
  - *Monies would be put into a special fund, not the General Fund. We don't ever want the groups to feel like they don't support the WSO. They need to continue to be responsible for it. The truth is that we have not been completely self-supporting through just member contributions since 1952.*
  
- Members may try to obtain special recognition.
  - *WSO does not ask how much a member is leaving for Al-Anon in their will when they call with questions and earmarking is prohibited.*
  
- Areas experiencing difficulties may think bequest monies would be used to support WSO big projects.
  - *The WSC would determine how the money would be used. Use big thinking—there are no limits. The idea here is mutual trust between the Board of Trustees and the WSC.*
  
- Al-Anon may get too rich. We're discussing money without limits and may become wealthy to a perilous degree. Would this be a violation of Concept Twelve?
  - *Funds would be used for special projects generated from and approved by the World Service Conference. A minimum of 25% of new money would be spent each year. Money isn't everything; we can do so many things with it. We're not reaching everyone we need to reach. Imagine what we could do with all the extra money. The*

*safeguards of this motion ensure that the General Fund is going to remain intact. The motion doesn't change the fact that funds to operate our WSO will continue to come from our General Fund. If people die and leave us additional money, we can fund projects. Newcomers don't care about how much money we have; they want relief.*

- How do we reconcile the Tradition of being self-supporting without violating Concept Twelve and idea of no limits?
  - *The policy allows excess bequest funds to only be used for special projects approved by the Conference. The policy does set a limit—there is still a limit on amount to world services (10% goes to General Fund). Under the terms of the motion, the WSO could not use this money to fund its annual operating budget or routine projects. How to spend the remaining money will be decided by the Conference.*

### **Comments:**

Based on past experience the likelihood of a large donation is minimal.

Rely on God rather than react to our fears just because we have never been there before regarding bequests.

If we had a bequest for a million dollars under the current policy we could only accept \$497,330 during the year 2008(10% of the total revenue of the WSO general fund as identified in the previous year's audit). This Motion would allow us to accept the remaining \$502,670 and to spend at least \$125,665 the first year and a minimum of 25% of the balance in subsequent years.

We don't contest wills or become drawn into family disputes.

### **Wrap-up:**

We come into Al-Anon in a culture of fear. When we first looked at abundant resources it was all about balancing the budget. We get fearful when we talk about expanding Al-Anon worldwide or having too much money. We don't think about how that money could be used to reach more people in pain from the effects of someone else's drinking.

Members say that it is their money and why can't they give back to Al-Anon what has been given to them.