

# CONFIDENTIAL: 73rd General Service Conference Background

## 2023 Conference Committee on Public Information

**ITEM O:** Review Report on the A.A. Membership Survey Process

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### **Background notes:**

#### *2022 Public Information Advisory Action*

The 2022 Membership Survey questionnaire receive final editorial review by the trustees' Public Information Committee after consulting with our professional survey methodologist, to address concerns raised by the 72nd General Service Conference related to the survey questions about Racial and Ethnic Background, and Employment Status.

A report titled, "Addendum to January 10, 2022, report" was provided to the trustees' PI Committee in July 2022 sharing new recommended wording for the questions about Racial and Ethnic Background, and Employment Status.

#### *From the July 30, 2022, Meeting of the trustees' Public Information Committee:*

The committee approved the revised 2022 Membership Survey questionnaire amended by the survey methodologist according to the 2022 Advisory Action. The committee reviewed and agreed that the project plan to administer the 2022 Membership Survey is comprehensive and will accomplish the goal of producing effective results. The chair appointed a subcommittee to include David S. (chair), Kirk H. and Reilly K., to review the recommendations and develop improved methods to report results of the 2022 Membership Survey.

The second part of this coversheet focuses on the 2022 Advisory Action related to the Membership Survey.

#### *2022 Public Information Advisory Actions (is this an advisory action or committee consideration*

After a thorough review of the professional survey methodologist report detailing actions to perform a sound membership survey, a 2022 A.A. Membership Survey be conducted with a budgeted cost not to exceed \$20,000. The process will include mailing, digital back-end response and analysis, creation of message and distribution, including a "How to video" for groups/members.

#### *From the October 29, 2022, Meeting of the trustees' Public Information Committee:*

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## CONFIDENTIAL: 73rd General Service Conference Background

The committee reviewed the 2022 A.A. Membership Survey process report. This summary report details the actions taken by the PI Assignment related to the goal of performing a sound survey in collaboration with the regional trustees, delegates and staff. Once the survey is completed, an evaluation will be provided to the parties involved seeking input about the survey process.

The information gathered in this survey is not only of great value but is extremely encouraging. However, survey results should not be used to project figures for either the Fellowship of A.A., alcoholics in general, or the population. A.A. members who filled out the questionnaire represent only those who attended one of the randomly sampled group meetings at which the survey was conducted. Every A.A. Membership Survey has been a current snapshot of a limited number of the total A.A. group population, based on a moment in time.

*From the January 28, 2023, Meeting of the trustees' Public Information Committee:*

The committee discussed the report on the 2022 A.A. Membership Survey process. The committee appreciated the documented account of the steps taken to complete the membership survey. The committee **agreed to forward** to the 2023 Conference Committee on Public Information the report on the 2022 A.A. Membership Survey process.

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### Background:

#### 1. [2022 AA Membership Survey Process Report](#)

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# CONFIDENTIAL: 73rd General Service Conference Background

Public Information  
Item O  
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## 2022 AA Membership Survey Process Report January 28, 2023

Patrick C., Public Information Coordinator

This is a full report outlining the internal process steps taken by the General Service Office (GSO), Public Information Assignment (as guided and supported by the trustees' Public Information committee), to complete the 2022 AA Membership Survey as requested by the 72nd General Service Conference per Advisory Action.

### Introduction

AA Membership Surveys reflect a snapshot of a limited number of the total active A.A. group population listed with GSO in their system of record (currently, NetSuite), based on a moment in time.

The last survey was completed in 2014. At that time, A.A. members from the U.S. and Canada participated in a random survey of the membership. Such studies have been conducted periodically since 1968 by the GSO. Alcoholics Anonymous conducts this survey to keep members informed on current trends in membership characteristics. The survey also provides information about AA to the professional community and to the general public as part of AA's purpose, to carry our message to those who still suffer from alcoholism.

Since that time, the General Service Board (GSB) and General Service Conference (GSC) requested that a survey methodologist conduct a thorough analysis of our survey processes and understand how similar General Service Structures perform membership surveys.

The 2022 AA Membership Survey process included the implementation of some of the key recommendations received from this work to improve our process. It is anticipated that additional improvements will be made based on the evaluation of this year's survey process that will be requested at the conclusion of the 2022 survey.

A total active status group population, per area, was pulled from the NetSuite system on Sunday, July 24, 2022. It is important to remember, these are only AA groups who are listed with GSO. This population is used to then determine the random sampling of groups to participate in each year's survey.

The 2022 AA Membership Survey total NetSuite population pull results:

- a. Total active status groups – Regular (in person or hybrid) was **56,432**.
- b. Total active status groups – Online/Virtual (i.e., not in person, online digital platform, telephone) was **682**. We confirmed with the survey methodologist and decided to pull

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## CONFIDENTIAL: 73rd General Service Conference Background

one group for each area that has an online active status group listed at GSO which = 86. (See below for the methodology used)

*Note: Some areas did not have any online active status groups listed.*

### The Project Plan

#### 1.0 Preparation and meetings with staff and the survey methodologist

- a. Reviewed resource materials to understand the process and recommendations made to complete the 2022 Membership Survey.
  1. Addendum to January 10, 2022, report on Questionnaire Dr. Cooper - Provided as background to trustees' PI Committee at July 2022 meeting.
  2. 2022 Membership Survey Dr. Cooper Final Report 6-28-22
  3. Workgroup report on Membership Survey 2020-2021, trustees' PI Committee
  4. 2020 Report: Dr. Alexandra Cooper, Duke University, Social Science Research Institute
  5. 2013 Report: J. Gary (NERT) TCPI Membership Survey Subcommittee
  6. Historical process documents on file with the PI Assignment.
- b. Developed several email communications clarifying that the details of the 72nd General Service Conference questionnaire discussion were provided to the consulting survey methodologist to inform a review and provision of an updated 2022 survey questionnaire.
- c. Held two project planning meetings with a past GSO Staff member who performed the 2011 (should this be 2014?) Membership survey and with the consulting survey methodologist.
- d. PI Staff Assistant held meetings with GSO support staff who participated in past surveys to understand lessons learned from system sample pulling and the concept and time it takes to perform the editing process on all submitted group's surveys. The editing process is to ensure that the survey questionnaires are taken through a criteria-based checklist to sort out any disqualified surveys received from randomly selected groups.
- e. PI Staff Assistant created individual area sampling spreadsheets to review with the consulting survey methodologist confirming that our process used to randomly select groups is sound. (See below for the methodology used)
- f. PI Coordinator discussed the concept and need for a potential Subcommittee on the Membership Survey reporting of results with the trustees' PI Committee chair. The subcommittee was appointed with the scope of reviewing all reporting and

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## CONFIDENTIAL: 73rd General Service Conference Background

recommendations developed regarding membership survey reporting of results. This subcommittee is charged with developing a recommendation for the trustees' PI Committees consideration of a new template and format concept for reporting results of this survey.

- g. Finally, the PI Coordinator developed an *Action Plan* document for the trustees' PI Committee to have a full understanding of the timeline and scope of work the office will be tackling to complete this Conference 2022 PI Advisory Action.

### **2.0 Random Selection of Groups**

*In Person Group Random Sampling methodology:*

Random sampling methodology is considered to be a highly effective, efficient, and best practice method of data collection to measure a target population.

The methodology uses a sample of the body one wishes to characterize to reflect the whole, and the fact that those sampled are drawn randomly, without bias, ensures that the characterization will be accurate. Specifically, the survey methodology uses true probability sampling, which involves selecting a sample that is drawn randomly from the parent distribution, meaning that each AA group has an equal probability to be selected for inclusion.

Importantly, according to the survey methodologist and past workgroups and trustees our survey "employs a sample size that is more than adequate to generate estimates that are quite precise".

In addition to random sampling, we also correctly use stratification and clustering techniques.

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### 2022 A.A. Membership Survey Sample



#### Notes:

A subset of the 780 in-person sampled groups that did not respond to a delegate request for confirmation of Active Status that GSO sent a paper survey instruction package to a delegate = 200.

A subset of the 86 sampled online groups that did not respond to a delegate request for confirmation of Active Status that GSO sent a digital survey link to a delegate = 15

#### **a. Created area spreadsheets reflecting the random survey sample selection. (Regular = In person – Hybrid groups)**

The procedure used begins with our system of group records, NetSuite. As we have historically done, we are pulling only groups that have the status of "active" in NetSuite.

The calculation used is a 1.3% of total "active" status groups being pulled from each of our Ninety-three (93) areas. If the result of this calculation is <1, that area's target should be assigned 2 active status groups (thus, no area has less than 2 active groups pulled). (Recommendation confirmed with Dr. Cooper, Oct 2020).

#### *Online/Virtual Group Random Sampling methodology:*

#### **b. Created area spreadsheets reflecting the random survey sample selection. (Online groups)**

We finalized a process for pulling a sample of online groups, noting that some areas do not have any online active status groups listed with GSO and some areas only have one online active status group listed with GSO. We confirmed our sample methodology with Dr. Cooper.

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An excerpt from the document titled, *“Sampling Strategy Recommendations for the A.A. Membership Survey of (Online) Virtual Groups.”*

As it plans its next (2022) membership survey, A.A. is planning to incorporate virtual meetings into its sample for the first time. A.A. is comprised of approximately 54,000 in-person groups across 93 areas in the U.S. and Canada; currently it also has 682 (online) virtual groups serving those same areas. That is, there are fewer virtual than in-person groups, approximately 1.3 virtual groups for every 100 groups within the G.S.O. Moreover, 6 areas have no virtual groups at all, a number have only 1 virtual group, and the most virtual groups any area has is 49.

As has already been described elsewhere, to sample in-person groups, the survey protocol relies on a stratified, clustered sample of 1.3% of groups per area. Applying this approach to virtual groups results in a sample of one group per area, across all areas that have virtual groups – 1.3% of 49, the largest number of virtual groups in any one area, is only 0.64, which rounds up to 1. Such a sample would involve 87 (*In the end, 86 were invited*) virtual groups, one per area, assuming all areas that list virtual groups have at least one virtual group that is active.

This strategy provides surprisingly accurate information about virtual group memberships, generally. The key reason, of course, is that 86 groups out of 682 is not, in fact, 1.3%, but is 13%. This is a large enough proportion – to generate fairly accurate estimates.

The beauty of this approach is that it oversampled virtual groups, allowing for sufficient study of them, as if you dropped the area stratification, 1.3% of the listed 86 virtual groups without concern for the area stratification would have yielded a sample size of about 10 groups, insufficient to yield good data.

The problem with this approach is that we oversampled the virtual groups. The solution is that each virtual group should be down-weighted relative to in-person groups, since there are so many of the in-person relative to virtual, if the goal is to provide the overall snapshot of AA. The beauty of oversampling percentagewise is a reliable snapshot, but the problem is that they are overrepresented without down weighting these virtual group’s results.

*Note: As of this report writing, January 28, 2023, the GSO PI Coordinator, working with experts, staff and service providers are still working out the final analysis and result calculations to prepare the final results.*

We will apply this approach to online/virtual groups resulting in a sample of one meeting per area, across all areas that have online groups. In the end the total number of areas, as of July 24, 2022, that have an online meeting listed in NetSuite is 86.

In NetSuite, there is an Area 95, which according to the Group Services Coordinator, is a miscellaneous bucket of groups that are not part of the active listings and even include some

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## **CONFIDENTIAL: 73rd General Service Conference Background**

international groups. These are under review by the assignment. To that end we will not pull a group sample from Area 95 but focus on active online groups (clustering) that are listed under Areas 1-93 (Stratification).

### **3.0 Calculation of random selection of sampled groups, per area, and reselects:**

First Step: The Public Information Staff Assistant was given access to a list of active status groups by the Business Systems Specialist from our database, NetSuite.

Second Step: They downloaded a list of each area's active status groups. The groups were numbered 1- \_\_\_\_ based off how many groups were in each area.

Third Step: The Public Information Staff Assistant calculated 1.3% of the number of groups for each area, rounding up to the nearest whole number, to get the total number of groups that would be randomly selected to take the survey in each area.

- For in-person groups: This procedure should be simplified to 1.3% of groups being pulled from each area. If the result of this calculation is less than or equal to 1, that area's target should be assigned 2, thus, no area had less than 2 groups pulled. *(Recommendation confirmed with Dr. Cooper, Oct. 2020)*
- For Online Groups: Each area with online groups had one group selected. *(Recommendation confirmed with Dr. Cooper, Aug 2022)*

Fourth Step: To randomly select each group, the Public Information Staff Assistant then used a randomizer function in excel: =RANDBETWEEN (1, \_\_\_\_)

The blank is filled in with the area's total number of active status groups. F9 was then pressed to solidify the number so it would not randomize again. A number is produced as the output to this function. The number correlated to a group in the area's list of groups. This was repeated for all 93 areas.

Fifth Step: Each Delegate was contacted with a list of sampled active status groups to determine if they were active. If they were not, we used the randomizer function again to find more numbers, and therefore reselect a new group.

### **4.0 Initial communication to delegates regarding randomly sampled groups:**

We communicated that the survey process success depends on the cooperation of A.A. members throughout the United States and Canada.

The delegate data collectors play a key role as the point of distribution and collection of the survey questionnaires for each area's randomly sampled A.A. groups.

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We offered each randomly sampled group a choice of selecting one of two methods to participate in completing the survey questionnaire: digital or paper.

The delegates performed the following three tasks and responded via email to the P.I. staff assistant at [publicinfosa@aa.org](mailto:publicinfosa@aa.org) no later than, Friday, August 26, 2022.

1. First, review the list of the area's randomly sampled groups to confirm if they are active.
  - a. If they are not active, please let GSO know as soon as possible so that we can randomly select a new group.
  - b. If they are all active, please still respond and confirm this with GSO so that we can proceed with the survey.
2. Second, let GSO know if any of the groups on the sample list are "specialized A.A. groups<sup>[1]</sup>" and if so, what type. Some delegates provided this information and others were not able to provide it.
3. Third, please respond confirming which format of survey questionnaire that each group will complete. The group can only choose ONE method for all participants to complete.
  - a. All the group members want to complete a digital survey.
    - i. We will provide a unique digital link to each group for a specified timeframe.
  - b. All the group members want to complete a paper survey.
    - i. Paper copies of the survey questionnaire will be provided.

This initial validation process was setup to be completed between August 12th to August 19th. After listening to feedback from the delegates and the fact we want the survey to be successful, we reanalyzed the initial response deadline and extended it to Friday August 26th, 2022.

In September 2022, via postal mail, delegates received copies of the survey instructions along with all materials needed to distribute and collect. We shared about the importance of following the instructions as any questionnaires that are not completed precisely as described, will not be counted!

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[1] Note: From "The A.A. Group" pamphlet, pg. 11, some A.A.s come together as specialized A.A. groups — for men, women, young people, doctors, LGBTQ, and others. If the members are all alcoholics, and if they open the door to all alcoholics who seek help, regardless of profession, gender, or other distinction, and meet all the other aspects defining an A.A. group, they may call themselves an A.A. group.

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### **5.0 Our system of groups records is NetSuite:**

We learned there are many groups primary contacts or general service representatives that are not up to date, in NetSuite, which hindered the delegates ability to perform the group status validation. There is future local service work that can be done to improve this data. It will take a concerted effort of the members in our general service structure.

Some delegates provided updates to the group's records and GSO is considering a project of making these changes after the 2022 Membership Survey process is complete. Before we make any updates, we will ask for delegate and area registrar agreement to move forward and make the changes we received.

### **6.0 Select Tabulation Vendor - RFP and Contract process:**

The PI Coordinator developed a short list of tabulation house vendors to request quotes on the work to be completed to provide the final coding and analysis results from the 2022 AA survey. Meetings were held with each vendor; a selection was made, and contractual agreements were signed. The cost of this portion of the project is \$14k which is within the overall budget not to exceed \$20k.

### **7.0 Training session about survey project and deadlines:**

One of the recommendations for improving data collection was to develop a training video for the delegates to accompany the detailed written instructions.

Due to time constraints, instead of creating a video, , it was agreed to hold LIVE informational sessions for Delegates.

- Session #1 9/12/12 at 5 p.m. to 6 p.m.
- Session #2 9/13/12 with FR interpretation at 6 p.m. to 7.p.m.

A session was recorded, and a video/audio file is available for future use.

### **8.0 Finalize the questionnaire versions and editing process for survey review:**

PI Coordinator completed the 72nd General Service Conference Advisory Action that the 2022 Membership Survey questionnaire receive final editorial review by the trustees' Public Information Committee after consulting with our professional survey methodologist, to address concerns raised related to the survey questions about Racial and Ethnic Background, and Employment Status.

The paper survey template created by Publishing is translated into all three Conference languages.

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A Survey Monkey Advantage Annual plan purchased for \$418.08 allowed for the creation of the digital survey link method of completing and submitting member surveys.

The annual subscription will be cancelled, as needed, to avoid automatic renewal.

### **9.0 Mail paper packets starting September 9, 2022, and email digital links:**

GSO mailed all paper survey packages with instructions and forty copies of the 2022 AA survey questionnaire to each delegate area in the U.S. and Canada.

GSO emailed all digital survey links, per sampled group, to the delegates in each area that had groups who selected this method of completing and submitting the 2022 AA survey questionnaire.

### **10.0 Data Collection Period - September 19 to October 24, 2022 (extended deadline):**

The delegates completed the data collection within the scheduled period, with one extension of the deadline.

### **11.0 Editing process for surveys to confirm qualified or to disqualify:**

All paper surveys received by GSO must go through an editing process to determine qualified surveys.

#### **SORT DISQUALIFIED SURVEYS:**

- **FIRST DISQUALIFICATION:**

- Any survey completed outside the submission window date range of 09/19/22 to 10/24/22.

- **SECOND DISQUALIFICATION:**

- If either Question 2 or 3 have **no response**, the survey is **NOT VALID** for our purposes. These are **DISQUALIFIED** surveys and will not be tallied. Put them to the side and continue to edit the rest of the questionnaires in the batch.

- **THIRD DISQUALIFICATION:**

- If **ALL Questions** 14, 15 AND 17 have **no response**, the survey is **NOT VALID** for our purposes. These are **DISQUALIFIED** surveys and will not be tallied. Put them to the side and continue to edit the rest of the questionnaires in the batch.
- The reason is that we would not be able to categorize the answers to these

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- surveys to a member's age, gender or racial or ethnic background. This is key to understanding the current A.A. population for this 2022 survey.
- **If any one or two out of these three questions are answered, the survey should be counted.**
  - Please note that it is okay to have blank answers on all other questions besides 2, 3 and ALL three of 14, 15 and 17. These are addressed by the editing guidelines below.

### **12.0 Data Tabulation Period - October 24 to November 20, 2022:**

The tabulation house vendor is scheduled to complete all analysis, coding, and provision of results at the end of this period.

Additional Work: As of January 24, 2023, the tabulation house vendor has been informed that some additional calculation of results is most likely needed based on the review and needs developing out of the survey results analysis. This is primarily related to the down-weighting suggested by survey methodologist for the online/virtual group results.

### **13.0 Subcommittee on 2022 Membership Survey results format and reporting:**

The Subcommittee on 2022 Membership Survey Results reporting has reviewed all methodologist and trustee committee reporting and suggestions developed regarding improving member survey reporting of results.

The subcommittee is presenting a recommendation to the full trustees' PI Committee that will include the new template and format concepts of reporting results for the 2022 AA Membership Survey.

Once a recommendation is considered by Conference and approved there will be full communication to Publishing and Communication Services departments to produce the final versions of the results reporting package elements. The concept package of a dynamic webpage and final draft pamphlet are planned to be produced, after obtaining 2023 Conference approval.

### **14.0 Evaluation of survey process – pending action:**

Several emails and letters to the Public Information Assignment and the Trustees PI Committee and the General Service Board regarding the 2022 Membership Survey have been received as of January 28, 2023. They were submitted by delegates and even group members who were sampled in the survey.

An evaluation survey about the process is planned, once the 2022 Membership Survey is completed.

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## CONFIDENTIAL: 73rd General Service Conference Background

These emails and letters received will be included in this evaluation debrief of process documentation so that all input will be considered for future membership survey process improvements.

##

[Back to Agenda](#)

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