



Retreat Forward Task Force (RFTF) Summary 2015

As a result of the ATOS retreat held in September 2014, the RFTF was appointed by ATOS Chairman Bob Dilworth to use the retreat's "Weary Report" as a basis for moving ATOS toward a role as a "mature" nonprofit organization. The RFTF is comprised of: Bill Coale (chair), Bob Evans, Don Phipps, and Mark Renwick. They collectively have spent hundred of hours working diligently over the past 10 months in establishing priorities and action items in line with their given charge. To date, the following actions have resulted from their dedicated work:

- 1) Formation of a Finance and Investment Committee, chaired by Mark Renwick, and charged with analyzing our financial operations and policies, and making recommendations thereupon. The committee was also actively involved in the discussions and recommendation for us to move forward with an interim full charge bookkeeper, while we investigate potential outsourcing of financial services.
- 2) Formation of a Policy/Bylaws Transition Committee, chaired by Jack Moelmann, and charged with analysis of current policies in relation to the recommendations from the Weary report. The committee has already made a number of recommendations toward amending, eliminating, and adding policy language to allow us to move forward during this transitional period.
- 3) Formation of a Communications/Marketing Committee, chaired by Richard Neidich, and charged with analyzing our current communications protocols, methodologies, and the challenges that ATOS faces in this area, including how the national organization interfaces with the local chapters.
- 4) In addition to recommending the above committees, the RFTF has been working closely with CE Ken Double in ongoing discussions of how to drive and support the reorganizational processes involved in moving ATOS forward. As a result, the RFTF has made a number of recommendations, including:

- a. Developing a list of “value added” items in terms of our individual members, as well as our local chapters. We need to have a robust response to the question, “Why should I belong to ATOS?” and “What does ATOS do for me (or my chapter)?”
 - b. Analyzing operations to improve efficiencies and allow us to expand the list of “value added” items that we can offer.
 - i. Use of robust Email list management software now in place
 - ii. Use of robust online teleconferencing services now in place, allowing for online sessions of up to 100 participants. Our first session, for chapter leaders/representatives, will be announced after the conclusion of the ATOS Convention.
 - c. Recommend investigation of potential outsourcing of finance, membership, IT, and other services where this option might be beneficial.
 - d. Recommend modifying the specific duties of particular staff members to better address the issues of online, e-mail “blast”, Facebook, and journal content.
- 5) On a personal note, Bill Coale has temporarily taken over management of the ATOS Facebook page as of a few months ago, and we have been able to attract 300 new “likes” for the page, many from individuals with no other connection to our organization.
- 6) RFTF members Bill Coale, Don Phipps, and Bob Evans, along with CE Ken Double, spent Memorial Day weekend contacting all constituent ATOS chapters for three distinct purposes:
- a. Obtain updated information on each Chapter, so that we can get the ATOS website populated with correct information
 - b. Obtain contain information for a “primary contact” from each chapter, so that we have a “direct line” to each chapter, encouraging interaction, and welcoming questions and suggestions from the chapters as to how we can better serve them and their members.
 - c. Announce the upcoming online gathering for chapter leaders. We hope this will be the first of many to come. We intend to include a wide array of offerings, so that we can better support chapter program chairs, treasurers, secretaries, chairpersons, and hopefully technical and operational questions as well. We are anxious to hear what topics/issues YOU would like discussion/help on.
- 7) In addition to all the above, the ATOS Board of Directors adopted a guiding document that outlined the new structure that clearly delineates “governance” and “operations”. This document should be very useful in helping us to develop new, and more appropriate behaviors that are in line with our goal toward organizational maturity.

Respectfully submitted,
Bill Coale, Chair
Retreat Forward Task Force
June 26, 2015