

# **American Theatre Organ Society**

## **STRATEGIC PLAN DRAFT**

PHASE 1 OF 2

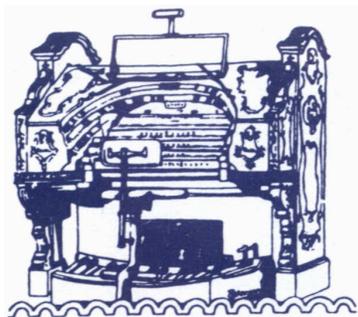
Prepared for Review  
By the ATOS  
Board of Directors

By

Doug Powers, Director, Committee Chairman  
Ken Double, CEO & President  
John Nelson, Strategic Planning Consultant  
et al

June 29, 2010





# AMERICAN THEATRE ORGAN SOCIETY

June 30, 2010

Dear ATOS Members,

The ATOS Strategic Plan is a product of a new ATOS planning process, designed to meet 21<sup>st</sup> century mission challenges. This planning process will be continued to better meet the many anticipated dynamic changes ahead.

The following ATOS Strategic Plan – Phase 1 is the initial product of this planning process. It is a cornerstone element of a *new overall ATOS management process still unfolding*. It provides a “living” reference for all future activities planned and underway, and supports these key features:

1. Redefined Board functions, Director positions, staff responsibilities, and organizational structure.
2. Systematic development of a progressive work program, based upon contributions by ATOS members, national leadership, and developing consortiums of various expertise.
3. Definition and focus of ATOS actions for improved management execution.
4. Visibility of the work program for better outreach to prospective members, donors, and supporters of our mission.
5. Above all, establishing meaningful and executable resources for your local efforts in keeping the theatre pipe organ a viable musical art form well into the 21<sup>st</sup> century.

Phase 2 of the ATOS Strategic Plan outlines a 10 year, mission-related action plan, aligned to available resources, and based upon the changes identified in Phase 1 for its execution. It is targeted for completion near the end of 2010. The combination of Phases 1 and 2 comprise the total ATOS Strategic Plan.

With your help, we propose to create a paradigm shift in operations, focusing on developing partnerships and alliances to facilitate the vision of a thriving ATOS.

Sincerely,

Ken Double; CEO, ATOS

Mike Hartley; ATOS Chairman

Doug Powers, Director and Chair, ATOS Strategic Planning Committee



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## **EXECUTIVE SUMMARY**

### American Theatre Organ Society Strategic Plan

#### Who We Are:

The American Theatre Organ Society (ATOS) is an international non-profit organization comprised of worldwide volunteer members who are committed to helping preserve and perpetuate the musical theatre pipe organ heritage that began in the early 20<sup>th</sup> century. Membership is made up of musicians, technicians, hobbyists, educators, and others who enjoy the music of the theatre pipe organ. Founded in 1955, the ATOS is constituted with regional member-chapters and is led by democratically elected leaders. It operates in accordance with 501 (c) (3) regulations.

#### Mission Statement:

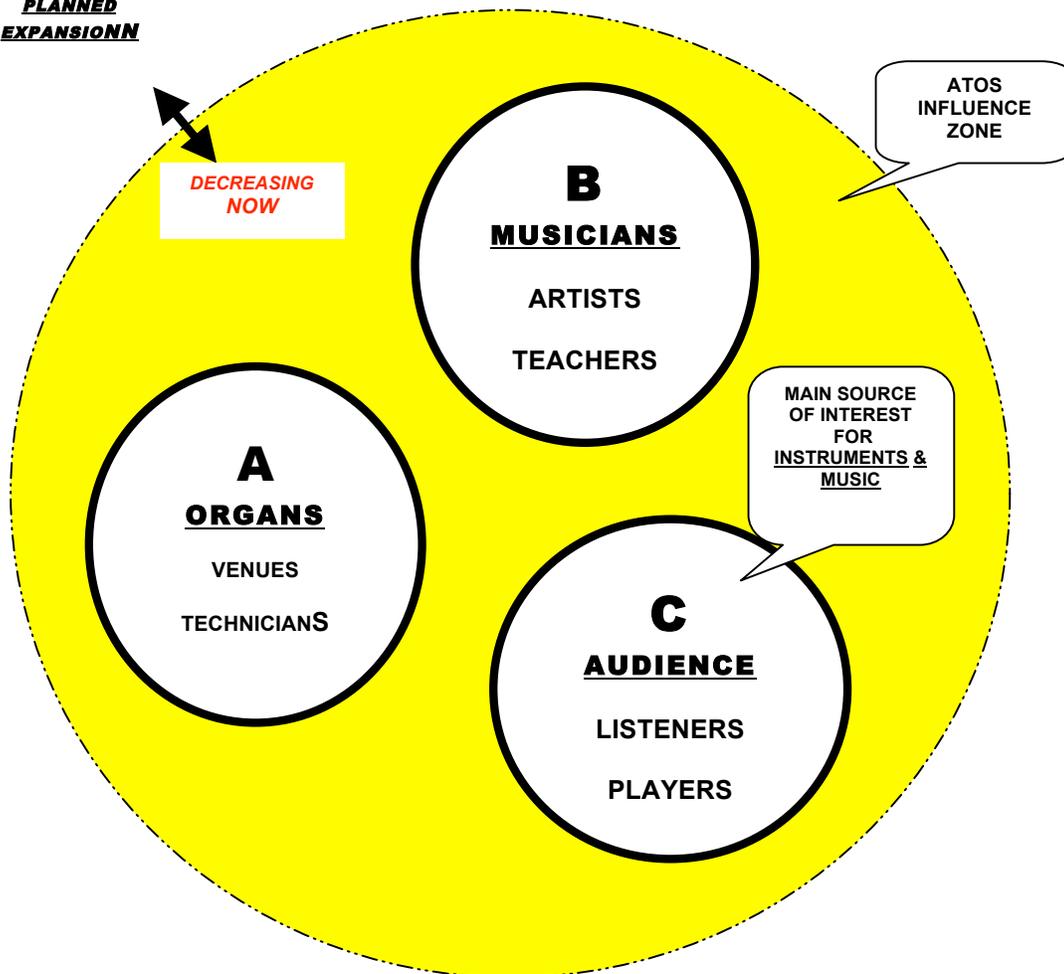
The ATOS seeks to motivate the preservation of legacy theatre organs, assist the development of musicians and technicians, and promote general public awareness regarding the value of this unique musical art field. Professional-led financial, educational and achievement recognition programs are conducted to facilitate a thriving theatre organ presence worldwide. Subordinate efforts include supporting theatre organ concerts and disseminating a wide variety of information in print and other media forms.

#### Vision Statement:

The ATOS expects to participate in growing the number of active theatre organs, expanding public awareness of this art form, and bringing a new generation of theatre organ audiences, supporters, technicians and artists into the fold of a flourishing ATOS. The efforts are expected to facilitate a thriving theatre organ presence worldwide.

Figure 1 below depicts the ATOS areas of operation and targeted influence.

FIG 1  
**PLANNED**  
**EXPANSION**



**The ATOS operates to facilitate, promote, assist and otherwise support areas A, B, & C above**

Throughout its long history, the ATOS has made many contributions to the preservation of the theatre organ legacy. These include supporting the development of young artists, recognizing talented artists, documenting organ histories and helping with numerous “spot” efforts.

Recent accomplishments expected to have on-going benefits to mission pursuits include the following items:

- Theatre Organ Summer Camp (High quality training for promising young organists)
- ATOS Technical Experience (“How to” seminars for theatre organ technicians)
- Theatre Organ at Macy’s (Public access to a theatre organ previously silent)
- ATOS Archives Relocation (Permanent home for historically important items)

Despite the many efforts over the 55 + year history, the theatre organ legacy is slipping away as its supporters fade away and instruments are abandoned. Much more effort must be expended to counteract the declines and to set lasting programs in place. The purpose of the

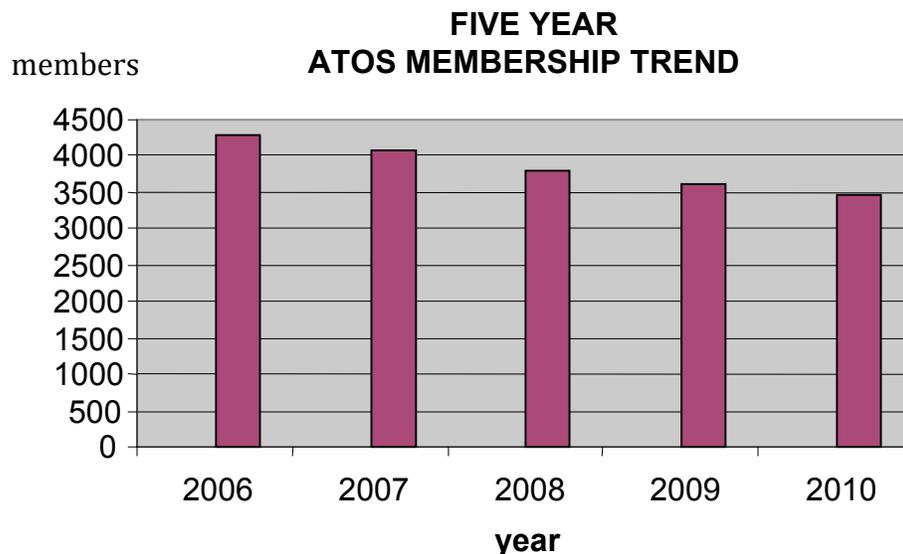
strategic planning reflected in this document is to reveal the issues at stake, and to identify actions required to achieve greater mission accomplishment momentum.

Situation Analysis:

- Despite having the benefit of many bright and dedicated elected individuals, the overall organizational achievement is low due to lack of discipline in the identification and execution of tasks, not setting achievement targets, and failure to track work progress. In this loosely structured operating environment, essential actions are accomplished by a relatively few exceptional leaders, while most others contribute less. *(It has been the traditional 80-20 rule for years.) Almost all work is accomplished through committees that sometimes lack the skills or motivation for the tasks at hand.*
- The ATOS is currently facing a serious threat against the existence of both the theatre pipe organ and its very own organization.
- A major reorganization of operations and alignment of key personnel is necessary to achieve our goals, and preserve the ATOS.
- The number of publicly accessible theatre pipe organs continues to decline.
- The average age of theatre organ enthusiasts is over 70 years
- Human and financial resources, availability of organs, and leadership required for mission accomplishment are all becoming scarce and are challenging effective mission accomplishment.

And the most critical current issue facing ATOS:

- **Membership has diminished by two thirds from its highest point of 10,000.**



### Steps Needed to Reverse the Membership Trend:

1. Examine deficiencies limiting mission achievement
2. Define a new work program focused toward future goals & an expanded operating sphere
3. Identify organizational support needed to accomplish the work program
4. Overhaul the organizational structure
5. Establish more efficient operating modes
6. Develop a larger financial base
7. Identify long range, mission-related actions
8. Seek beneficial alliances or partnerships with external businesses/institutions

### Planned Actions:

This plan will span ten years. A paradigm shift will emerge that will:

- Establish new priorities by merging, eliminating, and creating new tasks to reverse the downward trends from above.
- Reorganize ATOS' functions, committee structure, and leadership roles.
- Embrace the overriding belief that the future of the theatre pipe organ relies on the abilities of local leadership and their partnerships to manage the brunt of what is needed for mission accomplishment.
- Create progressive outreach efforts where ATOS can provide guidance, professional leadership, education, financial, and other valued resources to those local efforts.
- Build alliances and partnerships to enhance financial strength.
- Increase the roles and responsibilities of younger members.
- Incentivize the growth of new members; particularly younger individuals.
- Overhaul communication efforts to maximize the provision and exchange of information, ideas, and improve transparency.

***This has become the 21<sup>st</sup> century challenge in which our Society must succeed.***

### Time Frame:

- Goals and actions will be planned out over a ten-year period. This current draft does not provide in depth descriptions for each objective. The current ATOS Directors, officers, and staff shall craft these details with input from others. Please refer to page 38 for the proposed time line.
- The initial time frame is to have the actual reorganization outline completed by December 31, 2010.

### Budget Considerations:

At this time, there is approximately \$1.6 Million of cash on the ATOS' balance sheet. The restricted Endowment Fund (included in above) is approximately \$842,000. The specific programs that will be outlined in this plan shall have their budgeted costs associated with them as the reorganization outline is completed. Resource estimates for years beyond 2010 should be realistic, but will necessarily be less precise because of many influencing variables that cannot be fully anticipated.

Please refer to section 4, Fundraising– Financial Management on page 24 for more detail regarding the budget.

*(End of Executive Summary)*

## **BUSINESS OBJECTIVES**

- **Maximize revenues** through an organized program of fund raising.
- **Expand and utilize a formal development committee** with experienced professional involvement.
- **Overhaul the existing organizational structure**
- **Ramp up efforts and focus on creating a membership committee** responsible for aggressive recruitment and retention.
- **Establish a formal nominating committee**, responsible for recruiting qualified candidates for ATOS leadership roles.
- **Streamline the ATOS organizational structure.** Refine and reshape the Board of Directors' function, responsibilities, and accountability.
- **Develop an effective liaison network**, with clear structure and accountability.
- **Establish an ATOS national headquarters**
- **Sustain financial stability** through endowment building.
- **Continue to systematically build strategic alliances** with compatible associations, entities, and granting organizations.

## **KEY STRATEGIES**

**Continually assess the needs of the chapters** through liaison communications, surveys and other methods as appropriate, and vigorously assist their efforts to recruit new members.

**Continue to increase donor bases** through an effective marketing strategy employing high quality media kits showing ATOS effectiveness and accomplishment, and direct contact from the CEO and other cognizant staff members.

**Aggressively seek strategic alliances and partnerships** in areas relevant to the theatre organ, its place in entertainment sectors, educational institutions, and maintenance of the national leadership functions.

**Increase the use of electronic delivery and information systems in general** for member and other information, including the Theatre Organ Journal; implement redesigned [www.atos.org](http://www.atos.org), webcasts, links to media websites,

***Promptly revamp the ATOS organizational structure and operational modes***, for better achievement of urgent actions, and better conformance with proven 21<sup>st</sup> century business practices.

***Identify all existing theatre organs in public places***. Develop a database containing information about what the instruments are, where they are located, their operating status, who is responsible for maintenance and repair, and the venue outlook for them.

***Create an ATOS “Think Tank”, creating “What If” scenarios***. A group of individuals (not necessarily with intimate ATOS connections) will create possible situations whereby mission objectives can be met by ideas from “out of the box”. These concepts would then be methodically reviewed, prioritized, and plans to make them feasible will be incorporated into this strategic plan. See appendix #1 (ATOS Theatre Pipe Organ Development Division) for one such example.

### Plan Management

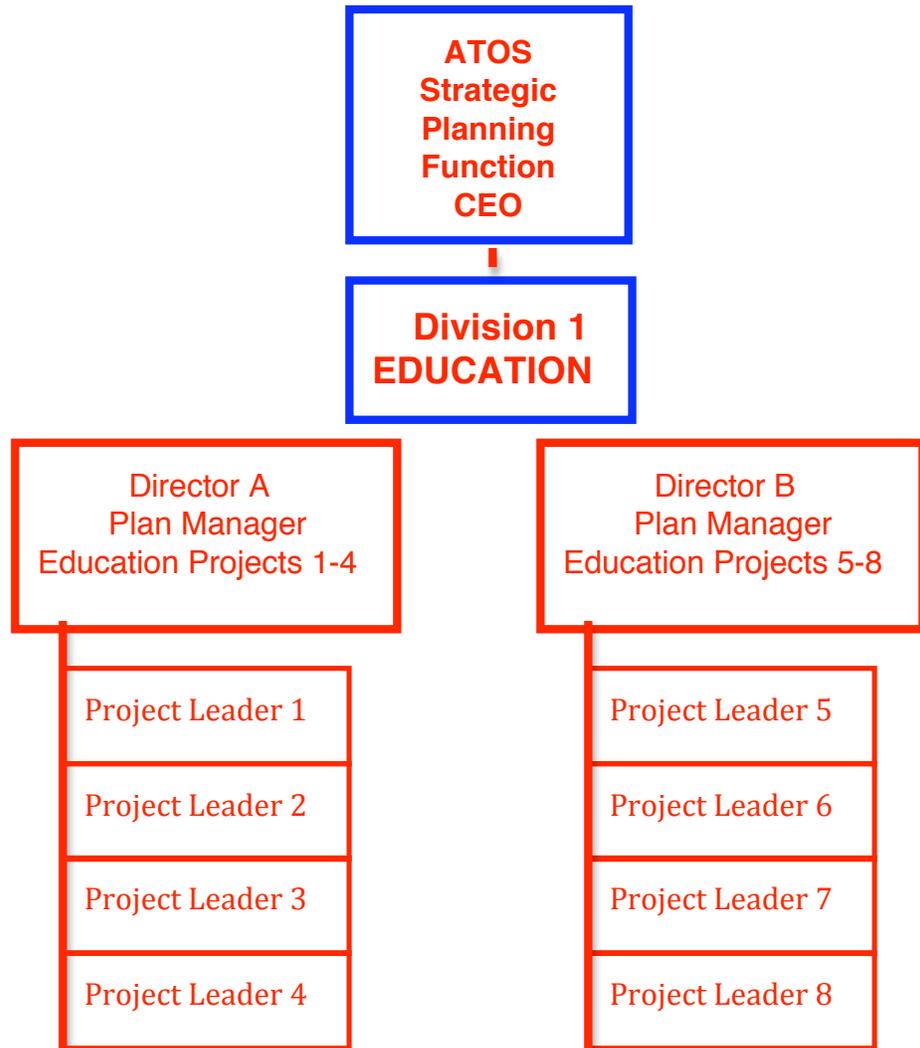
*This plan is a ‘living’ document.* It will be adjusted annually through Board review to reflect accomplishment, and any needed revision, and continued extension to the tenth year. It is the foundation document for all subsequent work plans.

*Board Directors shall become Plan Managers.* One or two directors will be identified to oversee each of the five major divisions as described below. They are responsible for monitoring work progress and reporting to the CEO prior to the mid-year and the annual board meetings

*Each division will have objectives that are translated into projects.* Detailed action plans including work breakdown structures, etc will be created by each division team. The project leaders will report work progress results and any need for change of plans to those responsible for maintaining the ATOS strategic plan.

See the following page for one example of an organization work flow pattern.

For example:



**NOTE:**

This merely demonstrates a simplified graphic look at reporting relationships and work flow. Each project would have as many line/staff connections as deemed necessary by the Plan Manager and his/her project leader team. For example, Project Leader 4 under Education Projects might have four programs listed. Each program might require one or several segments (components of each project or task) that will demonstrate a more detailed reveal of the work flow, accountability, budget, timelines, and so on. It will be the responsibility of each Plan manager to create this level of detail in his/her division segment. Also, this chart does not include more detailed reporting channels, or relationships between proposed staff and board positions.

## **MAJOR OBJECTIVES BY DIVISION**

This plan proposes five divisions or functions. Each division is to be chaired by one or more ATOS representatives, henceforth known as Plan Managers. Note the chart on the next page. These major functions are:

1. **ADMINISTRATION / OPERATIONS** (please see significant detail on this division on page 27 of this plan)

A. Financial management; planning and development; acquisitions, partnerships & mergers; scheduling; committee work; and general operations. Planned organizational changes will affect these functions most because they:

- Recast the operations organization to perform all ATOS operational activities.
- Expand the organization to include those functions associated with time-phased work identification and execution.
- Maintain an ongoing strategic plan showing what is to be done, when and why.
- Institute a work progress tracking and reporting system for actions underway.
- Execute routine work through the staff function
- Recruit leaders and other personnel according to functions performed.
- Utilize industry-common titles for positions. Examples are:
  - \* Chief Executive Officer (CEO)
  - \* President
  - \* Senior Vice President
  - \* Vice President (as needed)
  - \* Director (for specific functions)
  - \* Manager (for specific functions)
  - \* Assistant Manager (for specifics)
  - \* Apprentice (for non-management functions)
- Distinguish between executive and other positions. (Executives can commit the ATOS to official actions including financial expenditures allocated to their function; others cannot.)
- Provide a management growth process that allows migration of beginning managers to upper positions
- Institute a management training program providing:
  - Orientation for management newcomers.
  - Annual management training workshops.

- Mentoring by experienced personnel.
- Develop stronger operating ties to the chapter sub-organizations.
- Provide incentives for their association; e.g. access to and participation in ATOS technical databases, recognition and rewards for exceptional contributions, etc.
- Draw upon this pool for volunteers to do specific tasks.
- Assign member satisfaction survey & reporting function to chapter leaders.

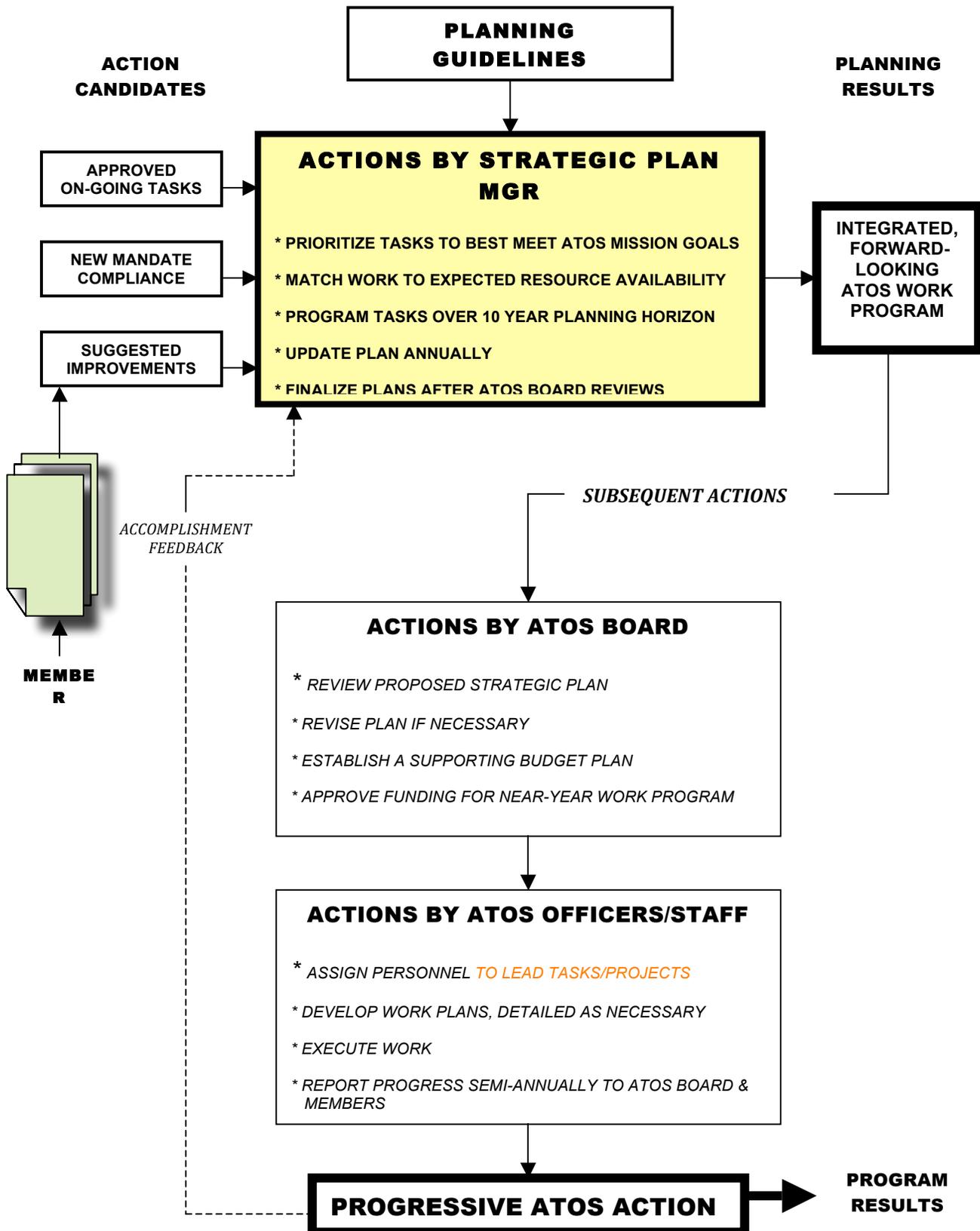
## B. STRATEGIC PLANNING FUNCTION

This key component is placed under a separate executive and will provide the oversight and glue that binds the planning and efforts of each division. Because of its critical place and value in managing ATOS' future success, it will become a major role of the CEO. This shall insure a full time coordination and direction of each plan, project, timeline, budget, and overall plan cohesion. In addition to the existing mandates for the CEO position (focused mainly on fund raising and partnership execution) this vital responsibility adds an even stronger imperative for this paid position to continue. Without it, there is no ongoing progress and effectiveness of any strategy for the future.

There shall be one officer (e.g. a senior vice president) whose position is a paid appointee. This position will essentially become the chief operating officer and will have close ties with operations and strategic planning, and will be included in this mix.

The Strategic Planning function, and its operating flow within the ATOS organization, is depicted below in figure 2. This new process is intended to accommodate constructive inputs for changes from all members, through an easy-to-use form shown in Appendix 5. The product 10-year plan, updated annually, is expected to provide full visibility for ATOS actions underway and planned, and provide a basis for member participation that has not existed before.

FIGURE 2



## Strategic Plan Recommendations/Actions related to Fund Raising

Solidify the Fundraising/Development Committee by these actions:

- a.) Reinforce commitment from current members - TBD in 2010
- b.) Expand the committee with targeted, interested members - TBD 2010 +
- c.) Tighten the current “loose” structure, i.e. specific goals, objectives, timelines, and reporting procedures - new and stronger structure in place with expanded members by Jan. 1, 2011
- d.) Re-visit initial discussions and goals, and re-focus on achievable objectives.

## **2. COMMUNICATION**

**Information systems (IT), public relations, member recruitment, liaisons, website, journal, direct contact.**

## **3. EDUCATION**

Adult amateur organist competition, adult theatre organ getaway, youth organist competition, university studies, youth scholarship, mentor program, and GWMF program, archives, and creating sample chapter business plans.

## **4. TECHNICAL**

“How to” examples, multimedia resources online, publications, journal articles, workshops, manuals, instructional DVD’s.

## **5. FINANCIAL MANAGEMENT / FUND RAISING**

All action relating to this activity, on both national and ATOS internal levels assisting local chapters that are associated with grants, loans, how to’s - 501 c (3) applications, development programs, etc. Also, the endowment committee and finance committee oversight of fund raising and investment strategies.

*What follows on the next page is a block diagram of the five major divisions along with some indication of their relationships to one another as well as with the strategic planning function. It is NOT an organizational chart, but a pictorial representation of a mix of current and future structure*

**Chief Executive Officer**

**Chairman of the Board**

**PLAN MANAGERS**  
(Board Directors or officers and others as assigned)

**COMMUNICATION**

- **Public Relations**
- **Member Recruitment**
- **Liaisons**
- **Website**
- **Journal**
- **Direct Contact**
- **Information Systems**

**EDUCATION**

- **Adult Amateur Organist Comp.**
- **Adult Theatre Organ Getaway**
- **“Young ATOS” Group**
- **Youth Organist Competition**
- **University Studies**
- **Youth Scholarships**
- **Junchen Apprentice Initiative**
- **Mentor Program**
- **GWMF Program**
- **Create Chapter Business Plans**
- **Archives**

**ADMINISTRATION - OPERATIONS**

Chief Operating Officer Position Here

- **Centralized Operational Oversight**
- **Committee & Organizational Structure**
- **Nominations Committee**
- **Conventions**
- **Board of Directors, Officers and Staff**
- **Acquisitions, Partnerships & Mergers**

**Strategic Planning**

**FINANCIAL MGT**

Chief Financial Officer Position Here

- **Finance Committee**
- **Endowment Committee**
- **Budget**
- **Grants & Awards; Loans**
- **501 c (3) Process**
- **Development Programs**
- **National Fundraising**
- **Investment Strategies**
- **Manuals**
- **Instructional DVD’s**

**TECHNICAL**

- **“How to” examples**
- **Online Multimedia Lessons**
- **Publications**
- **Journal Articles**
- **Workshops/Forums**
- **Manuals**
- **Instructional DVD’s**

NOTE: Red Text indicates high priorities

## WORKING GOALS BY DIVISION

### 1. COMMUNICATION

- ***ATOS will prevent further declines in membership.*** This will require a minimum of an increase in membership by over 6% per year, each year. This is managed by an aggressive and active membership action plan, whose members work directly with the Chairman of the Board on a regular basis. The current rate of attrition requires this minimum rate in order to halt the decline, and gradually reverse the trend. In other words, an average annual loss of 187 members (current reality) would require an absolute minimum of the same number in order to maintain the status quo. Currently, 187 members represents over 5% of the total membership. Obviously, increasing retention rate is a similarly critical goal.
- ***Restructure the ATOS liaison functions.*** On a monthly basis, the individual in the chapter relations position will create a one-page newsletter containing a set of bullet points or other concise headlines and content. This is to be sent to each ATOS member with a known email address. These bullet points may consist of key discussions or decisions made in teleconferences or other developments as they occur. Email addresses will be divided into groups by chapter, and the liaison for that group will send this newsletter as an attachment, or embedded into the email itself. Each liaison will have the opportunity to add his/her individual comments in the body of the email. An email copy of this communication will be sent by each liaison to the chapter relations staff member in order to assure timely communications, and a copy will also be sent to the CEO and Chairman for accountability purposes. The Executive Secretary shall be responsible for keeping email addresses current. Also – see “Direct Contact With Chapter”
- ***Provide Timely Meeting Minutes to the Membership.*** After each teleconference and in-person board meeting, minutes of those meetings will be posted on atos.net within two weeks. The Journal shall contain approved minutes of meetings most recent to the publication date of that edition. The above monthly liaison newsletter shall publish a link to these minutes.
- ***Launch Redesigned ATOS Website.*** This website shall have more functionality:
  1. More user friendly
  2. Easy navigation / search functions
  3. Increased use of multimedia
    - a. Performance Lessons
    - b. “How To” Restoration/Maintenance Tips
    - c. Fund Raising Examples
    - d. Etc.
  4. Interactive capabilities
    - a. Technical
    - b. Restoration Subjects
    - c. Concert Production Tips

- d. Virtual Theatre Organ Home Examples
  - e. Q&A Topics of Various Subjects
  - f. Etc.
5. Enlistment of contact editors
  6. Leveraged with the Journal
  7. Increased use of advertising
  8. Create specific eye-catching and relative segments such as:
    - a. Youth Corner
    - b. Technicians Guide to Restoration
    - c. Sample Organ Lessons (e.g. select clips from DVD project)
    - d. On-line surveys of all kinds
    - e. "Ask a Question" link to allow anyone to send a question or comment to anyone in ATOS.
    - f. Donation link
    - g. Fund raising techniques, etc.
- **Direct contact with chapters.** When appropriate and cost-effective, the CEO and/or Chairman of the Board shall arrange town hall type meetings with chapter members while traveling. Sharing of information, concerns, etc. will be discussed and salient points shared with the board or appropriate committees.
- A direct contact project will have ATOS representatives contact the President or other official from EACH chapter. This will be a telephone discussion designed to share ATOS' intent on supporting chapter efforts toward mission accomplishment. A common list of survey questions will be used in each phone call in order to gather pertinent information on how to provide support. Some would be objective types, others would be open ended. The purpose would be threefold:
    - Establish a direct person-to-person link to reinforce ATOS' resolve
    - Gather information needed to help ATOS set priorities
    - Provide significant data points to be shared in the Journal and included in a chapter management publication.
- **Journal articles.** The "Director's Corner" segment, and "From your President" segment shall continue to run in each journal. In addition, regular segments will be published highlighting the following categories:
1. *Youth Corner* – articles about youth camp, lessons, biographies of young artists, stories about their performance work, what drew them to the theatre organ, etc.
  2. *Technical* – restoration, repair, installation technique, etc.
  3. *Fundraising* – information on progress at the national level, examples of what other chapters have done, and so on.
  4. *Membership* – this will primarily be used to offer solutions to membership recruitment, possible contests for membership drives, and success stories from chapters on their strategies, etc.

Optional segments might include:

1. *Chapter Management* – sharing techniques used across the different chapters, articles on what has worked or not worked, and eventually a “Chapter Management Series” that will be part of another goal, below.
2. *Performance Techniques* – tips and ideas on performance, registration, and so on.

## **2. EDUCATION**

- ***Create a functional Chapter Management guide.*** This publication will draw upon input from successful chapters’ methods and procedures used to maintain their missions and keep their membership actively involved. Also, strategies adopted by ATOS as a result of work with its development committee, and the theatre management committee (see below). Available by 2011, it will provide a business plan containing a systematic approach toward fund raising, concert production, marketing, membership recruitment, creating alliances with local theatre organ venues, consideration for obtaining a chapter-owned instrument, and so on. This would not be a technical pipe organ restoration manual.
- ***Establish a Theatre Manager Consortium.*** This will consist of at least five theatre managers or owners from across the country where a theatre pipe organ plays an active role in that venue’s productions. The objective is to create both alliances and develop strategies to teach local chapters how to increase the exposure and involvement of theatre organs in their locale. This consortium will primarily meet via electronic means and one or two ATOS officials will chair it. Initial suggested venue representatives could come from:
  1. Michigan Theatre, Ann Arbor, MI
  2. Stanford Theatre, Palo Alto, CA
  3. Tampa Theatre, Tampa, FL
  4. Redford Theatre, Detroit, MI
  5. Chicago Theatre, Chicago, IL
  6. Paramount Theatre, Seattle, WA
  7. Akron Civic Theatre, Akron, OH
- ***Increase youth involvement in theatre organ pursuits.*** –This critical segment of ATOS’ future calls for a major change in the young members’ involvement in Society operations. As a start, this change will include, but not limited to:
  - **Create a “Youth Theatre Organ Society”**
    1. This will be a major component to all of the youth-oriented projects and will require a significant amount of dedication, resources, and creativity to manage.
    2. General oversight will be by an adult ATOS Director. However, this group would be a self-contained entity; managed and directed by the young members themselves.

3. The ATOS Youth Representative would be the group leader.
  4. So long as the Youth Rep is at least 18 years of age, he/she will have full ATOS Directorship responsibilities and privileges – including having a board vote.
  5. All current ATOS youth oriented programs are open to change; including, but not limited to the youth organist competition, youth camp, youth scholarships, mentor program, and the George Wright Memorial Fellowship.
  6. It is the overall objective for this new group to increase youth involvement in theatre pipe organ activities; creating a future basis for ATOS leadership and local mission support. Following are several tools for this group:
    - a. Providing no-cost ATOS membership for youths under 18 years of age.
    - b. Generating a youth-oriented ATOS newsletter and send to young ATOS members and prospects by email.
    - c. Developing a youth-oriented blog post for interchange of theatre organ-related information, opinions, and links to related multi-media sites.
    - d. Arranging/publicizing one or two youth-only theatre organ concerts in selected geographical areas to assess the potential levels of interest.
    - e. At each annual ATOS convention, the “Youth Theatre Organ Society” shall create a budget, promotion details, and concert with production value they feel will attract a younger audience. The use of a theatre pipe organ would be mandatory, but any other entertainment mix would be of their choice. Furthermore, an analysis of this production will be made by this “YTOS” to the convention audience, with written outlines provided so they might copy their ideas in their own local theatre organ venue(s).
    - f. Soliciting a few older ATOS members to act as organization liaisons interested in youth identified from attendance at these concerts.
- **Establish a Successful National Concert Tour** by 2011. This will provide a cost-effective format toward producing a public concert featuring a theatre pipe organ and other appropriate entertainment at select theatres across the country. There shall be the opportunity to partner with local chapters where they exist. The main purpose is to extend the exposure of this medium while marketing the Society to potential new members and supporters.
  - **Produce a series of three instructional DVD’s.** They will include: performance instruction, pipe organ technical restoration, and a general “who we are” marketing promotion to be used with schools, venues, local granting organizations, and so on. Performance instruction to be done by fall, 2010. Technical by mid-2011, others by fall, 2011.
  - **Establish a series of annual chapter management workshops.** Each year, there will be a two or three-day workshop that is done in collaboration (and budget) with chapter leaders. Costs are to be shared between ATOS and the chapters represented at each workshop. However, ATOS will subsidize the majority of the

cost. Topics will include areas of interest to chapters such as restoration, maintenance, fund-raising, chapter leadership, concert promotion and production, membership drives, performance, and so on.

- **Develop a forum for electronic organ owners.** In particular, virtual theatre organs and other digital instruments will have a means by which they may share information on their pursuits, seek assistance from others, and so on. Periodic articles shall appear in the Journal, and the website will have a segment dedicated to this purpose. Paid advertising and participation from vendors will be welcomed; The ETONES Newsletter is to be overseen by a project manager, and not a plan manager.

### 3. TECHNICAL

- **Finalize the reprint of the ATOS Shop Manual, which** will be completed and made available through the ATOS Marketplace in 2010.
- **Establish new restoration and preservation guidelines** by 2013 that offer user friendly achievable, and proper methods to restore, install, and maintain a theatre pipe organ.
- **Promote an aggressive profile of the Technical Consultation program** for chapters' use by marketing this resource through the Journal, website, and liaison communications. A survey (see appendix 7) will be completed to determine:
  1. Actual local theatre pipe organ inventory: their condition, accessibility, and use.
  2. Local need for the types and amount of technical support need.
- **Increase the amount of dollars available for the Technical Consultation program** from \$500 to \$1,000 per use, with a total pool of \$10,000.
- **Change the Junchen Scholarship** This will no longer pay for attendance at an AIO convention. Instead, ATOS will honor David Junchen by creating a three-day technical apprenticeship. This is to be done at an existing pipe organ shop with supervision and direction by a professional experienced theatre pipe organ technician. This scholarship's goal is to reward qualified volunteer technicians with an immersion into proper restoration and maintenance techniques, increasing their knowledge, and instilling a duty of thoroughness and care in the maintenance of theatre pipe organs.

The Technical Committee shall establish details of this program, including a list of professionals with their credentials, their organ shop capabilities, curricula, schedules, and budgets. This is to be announced in late 2010 and the first apprenticeship shall be in 2011.

- **Provide content, structure and lesson plans for a regional technical workshop**, to be held initially in 2010, and repeated as frequently as demand and budget allow.
- **Increase the technical expertise available to chapters** by participating in broader discussion and plans to establish systems and procedures for this purpose.

**Develop the capability to capture, store and disseminate audio and video information** from concerts, workshops, lecture, and other theatre organ-related events.

#### 4. FUNDRAISING

THE CURRENT FUND-RAISING COMMITTEE:

Co-Chairs: Dr. Karl Saunders, Dr. Marie Jureit-Beamish

Members: Ken Double, Tim Needler, Nancy Burton, (advisors or *ex-officio* Barbara Hammerman, John Near)

##### Current Activities

- The Annual Drive - fundraising via membership gifts; program began in 2008; runs in November-February time frame.
- Has generated roughly \$24,000 in each of the first two years of the program.
- Individual Donations - Working off an initial List of 100, Ken Double is making contact; individually seeking donations, sponsorships, underwriting of programs and Estate Planning gifts.
- The efforts have generated four new Estate Planning Gifts, valued at today's market at approx. \$500,000.
- Activities associated with the Endowment Fund.
- Activities associated with the Unrestricted Investment Fund account.

1.) Increase the Endowment Fund Balance to one million dollars by 2012

- a.) There is "magic" in the One Million Dollar level
- b.) The current level is approx. \$820k
- c.) Target specific individuals who understand the process and might provide the investment necessary to achieve this goal - this should be a Top 20 group of individuals - and specific meetings should be slated at conventions, or at private homes
- d.) Set target date for growth to two million dollars (2016).

2.) Increase the Unrestricted Investment Fund level to \$500k by 2011

- a.) These funds act as both “emergency funds” and operating assistance funds.
- b.) Work to raise the level of funding to \$750k, and as dollars are expended or budgeted, maintain that \$750 level so there is always a needed cushion of up to three years of funding for ATOS - target date for \$750k is 2013
- c.) Current level of Unrestricted Investment Fund is approx. \$430k.

3.) Increase Grant levels to individual Chapters

- a.) By achieving goals set out in Point 2 above, the Endowment Fund will grow, allowing more dollars to be awarded for grants
- b.) Maintain professional management of Endowment Fund monies and work toward maximum ROI for maximum benefit
- c.) Solicit continuing input and recommendations from the Finance Committee on best methods for maximizing returns
- d.) As Endowment Fund level grows, begin to target one, annual “Major Gift” by which ATOS can have a serious impact on the restoration/renovation of a major “legacy” instrument - this program should be in place in conjunction with achieving the two million dollar E.F. level - 2016.

## **NEW PROGRAMS**

ATOS fundraising efforts should be aimed at two specific areas needing attention in order for ATOS to grow, and operate more efficiently.

Increase professional staffing for ongoing operational programs.

- a.) Provides more effective prosecution of actions
  - b.) Relieves ATOS Board members, now supporting operational activities, to better support membership growth, fundraising, and general oversight.
- 5.) Target specific assignments best handled by professionals, and provide funding for additional staff
- a.) Determine if treasurer/accounting duties are best handled by a paid professional with background in accounting and budget management
  - b.) Determine if a marketing professional can better assist in areas of PR and promotion, aimed at exposure and an increase in membership
  - c.) Determine the amount needed in the budget to hire these two individuals, and create priority list of other hires and staff
  - d.) Re-focus attention of the board to fundraising and membership growth.

## 6.) Create a National ATOS Headquarters by 2016

- a.) A headquarters will allow for more centralized operations
- b.) It will allow for a “home base” for greater efficiency of operation, better day-to-day accounting of activities, and a central base for PR and marketing
- c.) Ideal location would be theatre or auditorium, centrally located or close to major transportation hub
- d.) Ideal structure would house a major instrument in the auditorium, and a secondary instrument for demo and teaching purposes
- e.) Ideal location would be part of a municipality with other instruments in close proximity making the headquarters city an obvious convention location on a regular rotating basis (every four-five years?)
- f.) Target date for National Headquarters - 2017, using a selected committee to be to explore this option in 2011.

The National Headquarters objective is most intriguing. Several items to be explored:

- 1.) Cost - It is reasonable to assume that several million dollars will be needed.
- 2.) Partnership - Might it be wise to explore a possible partnership with THS, Music Box Society, OHS, AMICA or other “like” organizations with a reasonable connection to ATOS and share the headquarters facility
- 3.) Naming Rights - With the “right” family or individual connection, major dollars might be raised by naming the facility for a major donor.

## **LONG-RANGE PLANNING AND GOALS**

Each individual category listed above has short-term goals, or financial levels to attain as listed. If ATOS is to exist for another 50 years-plus, this exercise should identify more long-range goals.

### Fund-Raising - 2020

The average age of our members would indicate the effort in Estate Planning is critical for the financial strength of ATOS going forward.

With literally thousands of members in the age group of 70-and older, the continued effort to reach these individuals with specific requests for funds to provide programs and marketing for ATOS is important.

By the year 2020: ATOS Endowment Fund: \$4 million

Investment Fund: \$ 750k (maintaining its level)

Operating funds: Annual budget could reach \$500k to handle professional staffing, etc.

Headquarters: An operating theatre budget could reach \$1 million annually

Target Gifts: 275 Major Estate Planning Gifts

Group A - 100 gifts of \$5k to \$10k  
Group B - 50 gifts of \$10k to \$25k  
Group C - 50 gifts of \$25k to \$50K  
Group D - 50 gifts of \$50k to \$100k  
Group E - 25 gifts of \$100k +

Incorporated into Group E - minimum of three \$1 million gifts.

This represents approx. 8% of the current membership providing a minimum of \$9 million in donations as outlined above.

## **5. ADMINISTRATION / OPERATIONS - Detailed Discussion:**

A major reorganization and alignment of key personnel is necessary to achieve our goals, and preserve the ATOS. Recommended changes are presented in this section. They are predicated upon the demonstrated inability of the current organization to meet future goals.

### **What's wrong with the present organizational structure?**

- Few clearly defined positions regarding responsibility and authority
- Unclear delineation of operational and board functions
- Awkward functional mismatches for needed interaction with external organizations
- Chapter organizations are not integral elements

### **What's wrong with the organizational process?**

Despite having the benefit of many bright and dedicated elected individuals, the overall organizational achievement is low due to lack of discipline in the identification and execution of tasks, failure to set achievement targets, and failure to track work progress. In this unstructured operating environment, essential actions are accomplished by a relatively few exceptional leaders, while others contribute little. *Almost all work is accomplished through committees that sometimes lack the skills or motivation for the tasks at hand.*

From the beginning, the ATOS organizational emphasis has been upon short term accommodation of member desires rather than longer term mission goals. There has been no desire to adopt a more progressive organizational approach because it would undermine the long-serving pattern that seems adequate to many, but fails to move the organization forward.

To a significant extent, the primary management of the ATOS has been performed by a small group of members, operating through elected director “fronts”, and through obtuse lines of communication and action. Until recently, most ATOS operational information has not been available to the membership or public at-large. A “closed shop” operating environment has existed, and it continues to be desired by some

### **What has been the result?**

- Very low overall mission accomplishment.
- Good, low-cost entertainment for a few at the expense of many.
- Slow decisions, slow actions.
- Operating stagnation.
- Declining functionality as experienced leaders fade away.
- Low appeal, impairing the recruitment of competent new contributors.
- Declining ATOS membership.
- Limited future outlook (No new horizons until recently).

**The following changes are expected to overcome the patterns of the past and to vitalize the ATOS.**

### **ATOS BOARD** - Recast the ATOS Board to conform to common business patterns:

- Reduce the number of Board Director positions to six or seven, two of which should be designated for non-members having useful knowledge/connections that could benefit the ATOS.
- Confine Board Director actions to the Board functions only, not operational activities.
- Redefine the Board general functions to include a combination of general and position-specific actions identified below:

### **General Actions:**

- Support promotions & liaisons with the “outside world”, as directed by the CEO
- Provide global quality assurance for operational programs
- Review and approve global plans and budgets.
- Assess performance of the President and subordinate executives annually, and recommend retention or discharge.

### **Position-Specific Examples:**

Chairman of the Board

- 1) Musical Education Liaison - Eastern U.S.\*
- 2) Musical Education Liaison - Western U.S.\*
- 3) Youth Development
- 4) Theatre Organ Preservation
- 5) International Liaison
- 6) Entertainment Industry Link\*\*
- 7) Young Entertainment Liaison\*\*

### Notes:

\*These two positions are recommended to provide important outreach by promoting theatre organ education to musical education institutions, advising curricula development, enlightening students with musical demonstrations, arranging admission to ATOS concerts, and supporting other types of liaison.

\*\* The two non-member positions need to be filled with entertainment industry professionals who can help ATOS outreach and possibly receive mutual benefits.

In the future, the title of ATOS Board Directors should be given only to leaders following the roles identified. To perform their functions, they will need operating budgets and perhaps some level of compensation. Business cards should identify them as ATOS Board Directors for \_\_\_\_\_(one of the five positions). The Chairman’s title is, of course, Chairman of the Board, ATOS.

*Positions 1-5 needed to be filled by persons thoroughly knowledgeable about ATOS operations and objectives, and have a stake in its success. Board Directors should receive a stipend commensurate with their level of responsibilities and have their operating expenses paid. The three year period for their tenure should be continued but also include extension options.*

This realignment of the ATOS board will overcome the operational entanglement that now exists, provide an easily recognizable operating element for outsiders, and help focus the organization on the all important outreach that has been much too limited.

## **ATOS OPERATING ORGANIZATION**

- Recast the operations organization to accommodate/perform all ATOS operational activities.
- Expand the organization to include those functions associated with time-phased work identification and execution.
- Maintain an ongoing strategic plan showing what is to be done, when and why.
- Institute a work progress tracking and reporting system for actions underway.
- Execute routine work through the staff function
- Recruit leaders and other personnel according to functions performed.
- Utilize industry-common titles for positions. Examples are:
  - Chief Executive Officer (CEO)
  - President or Chief Operating Officer
  - Senior Vice President
  - Vice President (as many as needed)
  - Director (for specific functions)
  - Manager (for specific functions)
  - Assistant Manager (for specific functions)
  - Specialist, technician, apprentice (for non-mgmt positions)
- Distinguish between executive and other positions. (Executives can commit the ATOS to official actions including financial expenditures allocated to their function; others cannot.)
- Provide a management growth process that allows migration of beginning managers to upper positions
- Institute a management training program
- Orientation for newcomers.
- Annual management training workshops.
- Mentoring by experienced personnel.

- Develop stronger operating ties to the chapter sub-organizations.
- Provide incentives for their association such as access to and participation in ATOS technical databases, recognition and rewards for exceptional contributions, etc.
- Draw upon this pool for volunteers to do specific tasks.
- Assign member satisfaction survey & reporting function to chapter leaders.

The recommended structures for the organization is shown on page 37. Each of the subordinate boxes depicted (staff and operations) can be expanded to accommodate all activities currently anticipated.

**Allocation of actions to functions is summarized below:**

Chief Executive Officer

- \* Provide overall management of the ATOS.
- \* Align the organization, internally and externally with the strategic vision.
- \* Facilitate activities outside the ATOS while guiding other executive officers, leaders and employees toward the central objectives.

Office of the President

- Lead operational management & administration
- Conduct financial budgeting, control and reporting
- Provide centralized administrative record mgmt
- Assign committees for special, one-time efforts as needed.

Staff

- Support routine, recurring tasks (publications, print and electronic).
- Manage human resources.
- Arrange legal expertise when needed.
- 
- Maintain & operate Information technology assets.
- 
- Provide convention support\* (Function transferred to Public Events Org. in 2015)

## Strategic Planning

- Define needed non-routine tasks, (what, why, when, and how many resources required)
- Prioritize and time-phase tasks over a 10 year period so that the total yearly effort is within means
- Identify any organization issues that may be associated with actions planned
- Compile the ATOS master plan containing the information developed.

## Project Execution

- Execute the identified in the Strategic Plan.
- Establish project plans for each task based upon MBO techniques.
- Recruit personnel from within the ATOS, and from without if necessary, having the requisite skills.
- Report task progress monthly to President, and semiannually to the ATOS Board
- Identify unexpected carry-over work for adjudication in the Strategic Plan

## Public Events (2015)

- Plan with chapters and other affected organizations:
  - Conventions
  - Regional Conventions
  - Touring Organ Events
  - Special Concerts
- Arrange support within established ATOS policies
- Capture & distribute associated media

## Capital Assets (2015)

- Manage, operate and maintain:
  - ATOS headquarters facilities

- Other organs and associated facilities as obtained by the ATOS
- Maintain records showing usage, expenses, issues
- Provide a semi-annual report showing financial income and outgo to the President.

## **Management Staffing**

The number of persons or activities that can be managed varies greatly according to the character of the work being performed. For non-routine activities, optimum span of control is about seven. For routine activities, that number can be higher. For the work planning and execution functions, seven or eight subordinates would be reasonably controllable. (These could be seven or eight individuals, sub-groups, or some combination).

An executive level leader is recommended to eventually head each of the shaded functions shown on the proposed organization charts. Also, the Vice President should be at the executive level. In time, a chief financial officer position may be necessary, and it would be at the executive level. Separate the duties of President and CEO because they will be too demanding for a single person to execute well.

Compensation should be provided to all executives at levels depending upon the position challenges and amount of hours expended. (*Pay proportionate to support time spent*). Personnel recruited for the executive positions might be assured 5-year tenure, depending upon satisfactory performance over that period, with extensions possible.

An executive level position is recommended for the staff function because the responsibilities associated with human resources must be added to accommodate the acquisition of some supporting personnel. The staff function, now functioning satisfactorily thanks to a few stalwart individuals, will face serious challenges as their expertise fades away *and the types of support increases with the new mission objectives*. Maintaining the plethora of activities they perform will depend upon careful selection of replacements personnel, and that will depend upon effective leadership.

The process for soliciting and voting for all leaders should be continued. However, the period of service below the executive and Board Director levels should be for one year with the option for extensions up to three years. This change may make support more attractive to some because they cannot continue for longer periods, and thus perhaps increase the opportunity for service to a wider number of members.

## Work Flow

Typically, work underway in 2010 will continue as before, and with the same persons. However, they will be assigned, according to the kind of task/action, to one of the organizational functions as show below.

Work will follow one of these paths:

<u>Type Work</u>	<u>Org. Element</u>	<u>Example</u>
Continuing routine work	Staff	Theatre Organ Journal
New, non-recurring work	Strategic Planning	ATOS Headquarters
Non-recurring work underway	Project Execution	Archive Relocation
Ad-hoc, non recurring workPres.	Appointed Committee *	Reorganization

Committees will continue to be used, but only for time-specific, specialized work requiring a skill set outside the established functions. Participants might be recruited from within and without the ATOS membership. *Once the committee objective is achieved, its operation will be discontinued. Any follow-up activity will be accomplished either by the Staff, if routine, or the Project Execution function if non-recurring.*

*(Studies have shown that three persons constitute the most effective committee. The addition of more members typically delays the expected results.)*

## **Implementation**

Target the new organization to begin formation as soon as possible, with 1/1/2012 as a target date for staff changes. During the remainder of 2010:

- Make the desired organizational changes in compliance with ATOS constitutional mandates.
- Provide a management primer concerning the new organization, how it will work, and the objectives upon which it is based for all leaders.
- Develop for each position a job title and short description that can be used for volunteers or paid personnel, and begin the recruiting process.
- Reassign current elected members to new operating functions or let them serve out their tenure operating in the staff support function, or let them resign.
- Provide all members with an overview of actions unfolding, and the associated expectations.
- Develop guidelines for new and repositioned leaders to help orient them to the new responsibilities.
- Notify allied organizations about the organizational changes and the new contact points.

- A key objective during the implementation should be to obtain pertinent ATOS knowledge and personally-held records from the existing support personnel. (And decide where and how to store and control such material).

## In Summary

The recommended organizational changes will accomplish the following:

- Break up the long-standing, archaic operating pattern that never was good, but succeeded through the efforts of a few exceptionally dedicated individuals.
- Provide critically needed management focus for getting things done.
- Open opportunities for more participation by the membership at large (numbers and skills).
- Provide a “scalable” framework for action that can be easily enlarged to accommodate the larger operations needed to truly meet mission goals.
- 
- Show the ATOS to be astutely operated---crucial for the solicitation of large-scale fund donations.
- Provide a management growth process supporting progressive advancement to positions of greater responsibility---critically needed to groom future leaders.

The proposed changes will surely lead to member unsettlement, and, for some the “hobby” type operating mode will be missed. **However, the options are change or die.** When these or similar recommendations be adopted, then extensive work will be needed to expand the organizational framework with sufficient detail for actual application, explain the consequences to the members, and make the changes. The need for the changes is now but the work to be done will take at least six more months.

In time, the ATOS can be a highly respected organization; one offering career opportunities for some, the chance to acquire highly marketable administrative and management skills for all, and great personal self-satisfaction for job accomplishment.

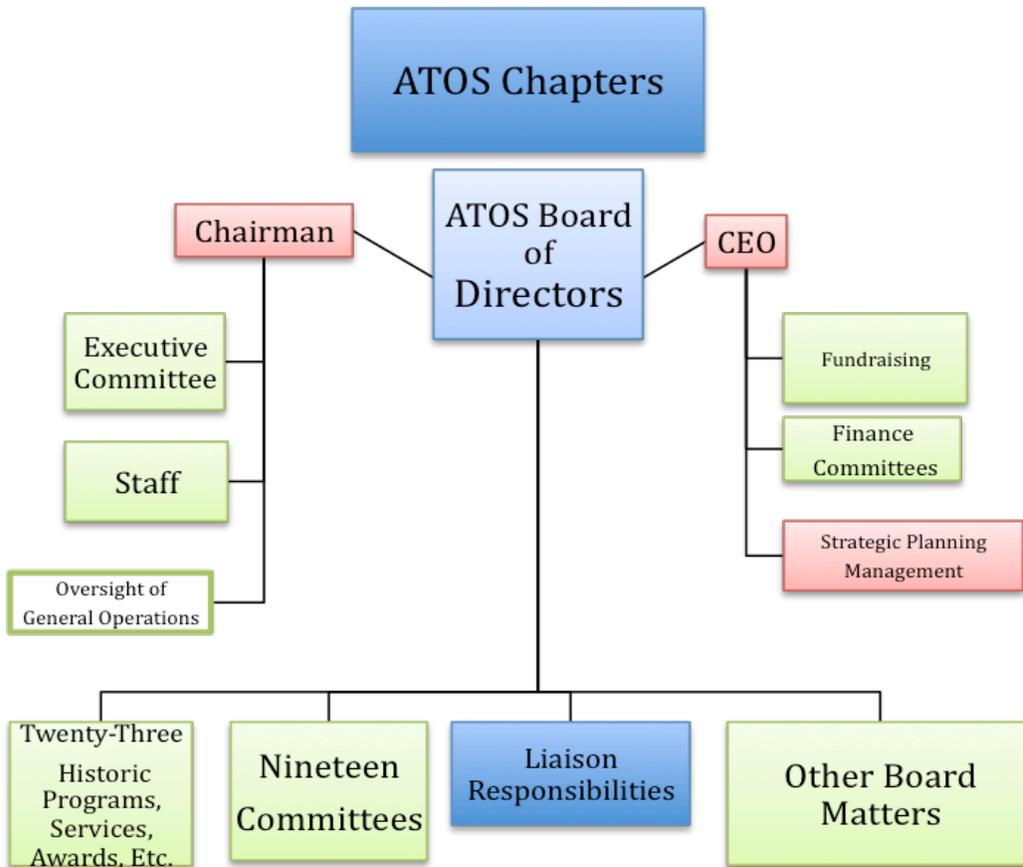
For the professional organists, the larger-scale ATOS operating sphere intended, having extensive outreach into various musically-related enterprises, offers many career enhancing possibilities for performing and teaching. Seminars for accomplished organists are planned to help increase the appeal of the theatre organ to unfamiliar audiences. These seminars will focus upon:

- Sharing performance techniques and experiences among the organists
- Enhancing entertainment levels for performances and recordings
- Gaining the experiences of musicians in allied musical settings
- Exploring instrumental combinations
- Obtaining guidance from seasoned teachers such as John Ferguson (example)

## Transition to the New Organization & Operating Mode

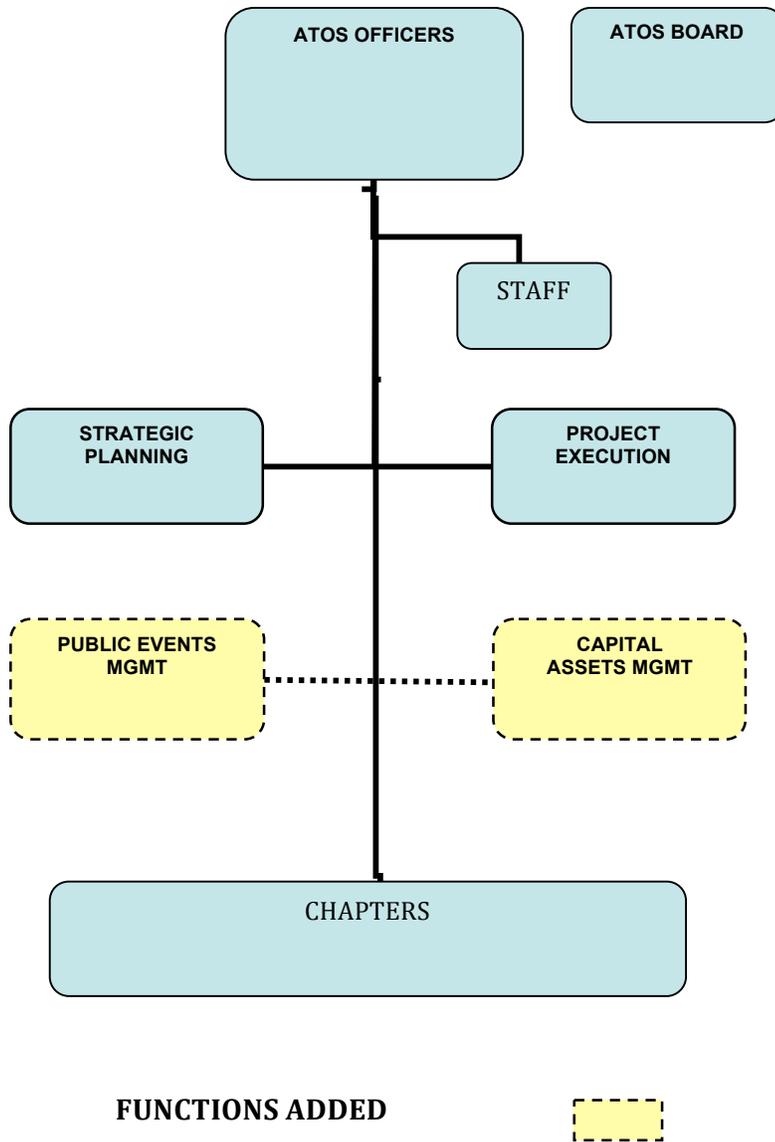
The plan is to continue operating with the present organization, and in the current operating modes, until the end of 2010. The new organizational structure will be established at the beginning of 2011 and leaders realigned to match the new functional roles as possible. Block diagrams showing the current and planned organizations are shown below:

### CURRENT ATOS ORGANIZATIONAL STRUCTURE:



- Undefined Functions
- Dispersed Staffing
- Shared Responsibilities
- Unclear Reporting - Accountability
- Uncompensated, Part-Time Leaders
- Uncompensated, Part-Time Staff

PLANNED ATOS ORGANIZATIONAL STRUCTURE:



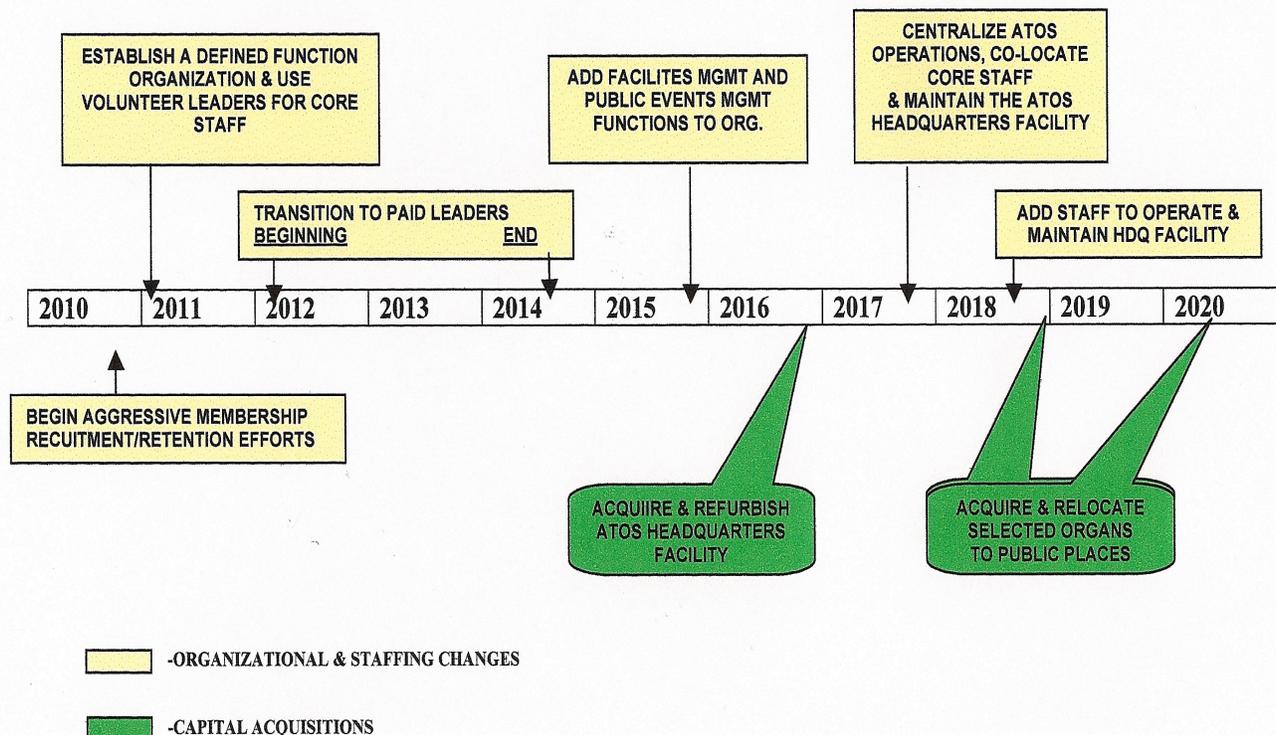
- Defined Functions
- Centralized Staffing
- Personal Responsibilities
- Clear Reporting - Accountability
- Compensated, Largely Full-Time Leaders
- Compensated & Volunteer Part-Time Staff

## Expected Results:

**Clear Organizational Focus**  
**Increased Operational Efficiency/Effectiveness**  
**Ability to Support Expanded Mission**  
**Increased Financial Support**

Gradually, and as funds permit, there will be a transition to compensated full and part-time leaders to provide needed management skills and operational continuity as shown on the action timeline shown below:

### TIMELINE FOR KEY ATOS EVENTS ASSOCIATED WITH MISSION EXPANSION



## Transition Staffing Considerations

The transition period until the planned organization is fully in force will be 3-4 years. During that time leader roles, levels of authority and titles will change from those in 2010. Initially, the responsibilities of the leaders will be little different, but will focus upon specific areas rather than ATOS operations at-large.

During 2011, expanded mission related objectives will be established based upon the level of financial support expected for the following years. In conjunction, specific job responsibilities will be defined for each leadership position, to be used for recruiting qualified personnel. These positions will be available to ATOS members and the public at large as they are opened for recruiting during the 2012-2014 time period. The selection of qualified candidates will be accomplished by member vote as now. During this period, the current leaders will be asked to help identify appropriate subordinate staff members, as needed, to help accomplish the planned objectives for their function

The leader job titles and compensation will evolve based upon the year-by-year responsibilities, the associated authorities, and job circumstances. In addition to the leaders, other positions will, in some cases, require professional-level skills. For example, initially only part-time legal services might be required, and these could be obtained as needed through an on-call arrangement. Later, should full-time legal services be required then a qualified attorney would be recruited.

Not all leaders will need to executives, nor will all executives need to be leaders. Executives will be created only as needed, not for title embellishment, but to discharge specific corporate level responsibilities. Basically, they will act as surrogates for the president to expand his/her span of control.

As the mission expands, and before the centralized organization is established, some leaders may need executive authority to maintain efficient operations while in the dispersed operating mode. For example the procurements of goods and services could possibly be delayed unnecessarily if such approval had to wait upon action by the remote president or financial officer. On the other hand, in the centralized operation planned, most of the key leaders will be co-located, and such authority might be unnecessary.

Many situations will need the benefit of rational consideration and decision making to make the planned changes. The strategic plan and its updates are intended to provide essential incremental guidance regarding the intended changes. The associated member input process will allow full participation by all who choose to help make the transition as smooth and interesting as possible.

## **ATOS Theatre Pipe Organ Development Division**

What if:

The ATOS were to focus a majority of its millions of dollars of resources to seeing that each year, one or two theatre pipe organs are acquired, restored, and installed in a public venue where the organ would be used on some regular basis?

The hypothetical works something like this:

1. Through its theatre manager consortium, ATOS builds contacts and relationships with performing arts centers, theatres, schools, universities, auditoriums, etc. (even churches if appropriate - to wit: Grace Baptist Church in Sarasota, Florida) and other budding public venues where a TPO would be welcomed.
2. To encourage donations, 501 (c) (3) tax benefits are offered to current owners of instruments worthy of restoration.
3. A set of criteria for installation is developed, guaranteeing regular use of the organ, reasonable local chapter access, discounts on venue rent and promotion for local concert series, sponsored in part by chapter "X".
4. An organ restoration crew is created from existing theatre organ technicians, pipe organ repair shops, and other appropriate resources. Conditions might include:
  - 1) The shop is paid a discounted fee as a negotiation for continued contracts in the years ahead.
  - 2) In addition to their own established staff, the shop utilizes local chapter and other volunteers who are screened for their skills and contributive value. Sources of volunteers would include local chapters, local universities or technical schools, local job shops of appropriate relative skill, and possibly an official ATOS apprentice who is chosen from other criteria.
5. Theatre management does pay a portion of the cost to install the organ, but ATOS subsidizes a large portion.

6. ATOS also has a sub-section (or other component of the Education Division) whereby local talented keyboard artists are given theatre organ performance instruction and are awarded small stipends to play the organ at regular intervals (something like the El Capitan Theatre or Castro Theatre in California or the Redford in Michigan).

7. The Technical Division takes on the responsibility to teach chapter and/or other local technicians the proper maintenance methods, and makes itself available for free phone/email consultation up to certain level.

8. Promotional content and concert/program outlines are customized by ATOS in conjunction with the Theatre Managers' Consortium. These are shared across ALL venues in the development division's database

The above hits all of the top issues facing ATOS' future:

1. It increases the number of publicly available theatre pipe organs
2. It increases the number of artists who are capable of performing on theatre organs
3. It influences and possibly increases the number of technically disposed individuals who are able to perform professional level restoration and installation techniques.
4. It creates a reason for more local exposure to the TPO and thereby influences the chances of increasing involvement and membership.
5. It creates an exciting opportunity for donors to provide financial resources to the cause.
6. Theoretically, we could increase the use and life of 10 – 20 theatre pipe organs in ten years, and potentially have a significant impact on the increase of new ATOS members.

This is what is meant by “what would ATOS do if it had \$20 M” The natural transition is “how do we make the above an achievable reality?” Ideas might include

- Scaling down the frequency
- Helping worthy chapters do this on their own
- Seeking out organs that need little to no restoration
- Working with venues with existing instruments that need help
- Higher use of volunteer / donation sources
- and so on . . . .

SO . . . what are your “what if’s”?

*APPENDIX 2: Data Points on How ATOS Can Help the Chapters  
(taken from the 2008 ATOS Member Survey)*

**Which of the following would you like ATOS to make available to your local chapter?**

- 21.38%** Chapter concert promotion and marketing assistance
- 20.00%** Public relations and marketing tools to take to outside venues and schools
- 17.43%** Membership drive help
- 11.38%** Fundraising assistance
- 9.72%** Higher levels of grant money for your theatre pipe organ project
- 9.72%** More visible ATOS liaison
- 7.34%** Theatre Organ restoration/maintenance guidance
- 3.03%** Other

**How can ATOS better support and aid your local chapter?**

- Assistance in / improve national and local marketing, publicity and promotion (36)
- Improve communication and visibility between national ATOS and local chapters (i.e. frequent liaison visits, be more responsive and involved, contact members personally) (33)
- Financial assistance (sponsor events, funding, grants) (23)
- Financial guidance (writing grants, professional help, ideas for fundraising, budget examples, becoming legally recognized “non-profit” organization, tax exempt issues, being put in a will) (21)
- Supply chapters with print material / promotional material to hand out at concerts, print in newspapers, submit to local TV and radio stations, etc. (13)
- Increase membership (11)
- Better communication between chapters (Newsletter exchange, reports in the journal of successful ideas and ventures, up to date calendar) (10)
- Better chapter leadership/new officers; train local officers or provide code of conduct (9)
- Motivation, support, and encouragement (8)
- Help training technicians (i.e. workshops), publish technical notes, and offer technical support (6)
- It’s hopeless / we’re beyond help (4)
- Publish a list of contacts: names and telephone numbers of a local chapter’s members for travelers to use to avail current activities of local chapter. More than the list that appears in the front of the ATOS magazine (4)
- Make new and old members feel more welcome (3)
- Lower membership and convention fees (3)
- Help planning a regional convention (3)
- Bring in celebrity/guest artists and technicians (3)
- Have an ATOS official like Ken Double visit our chapter (3)
- Better website with more downloadable material (recorded music, videos, printable music, articles, etc.) and social networking features (i.e. Facebook or myspace type) (3)

- A theatre organ (3)
- A national touring concert series (3)
- Publish artists names, names contact information, and standard fees (3)
- Provide examples of operating agreements with venues (2)
- Publish upcoming concerts schedules in a timely manner (2)
- MTOS is currently working with the Charlotte Arts Council to restore the Carolina Theatre and install a theatre organ in it. ATOS guidance and help will be needed at that time (hopefully next year) (2)
- I am not aware of anything ATOS does for my chapter (2)
- Establish relationship with / support AGO (2)
- Provide information on where to purchase organ music
- Public television documentary / program
- Get the pro organists to play modern music.
- ATOS sponsor (in part or whole) a major American theatre organist for outlying memberships, e.g. Support and encourage national conventions in new areas.
- Create national headquarters
- Separate subscription to magazine from membership dues
- Get rid of the division between electronic and traditional theatre organs
- Don't be so greedy w/ convention profits
- Hold board to deadlines and standards of operation
- Blanket licensing agreements for silent films as is currently being done with ASCAP; a 15-minute professional video to tell the TO story and solicit ATOS and local memberships
- Help w/ the Pilman Theatre Project
- Return the instruments to their original size and function. The mega instruments scare people off from playing them. Instruments w/out players do not have much use.
- Establishing a director's position w/ a fixed local office.
- They should allow currently unaffiliated groups some level of recognition
- Oversee historic installation at Chicago Theater and Oriental Theatre
- Answer correspondence for starters
- More people/chapters need to have more interest in applying for the programs ATOS has to offer. Many older people say they only want to have fun in their remaining days, not work on or learn a new skill. This is disturbing for younger people to see.
- At Puget Sound, help with restoration of Paramount Theater Organ Project
- Sooner State is located in Tulsa, OK. I live in OK City where there is no chapter. A major restoration of an Oklahoma artifact Kilgen restoration in OKC museum is never mentioned at Tulsa , Sooner State, nor the U of OK TO dept. mentioned. OK City is the largest city and the capitol!
- At this point we'd accept almost anything. Our r/ship w/ landlord isn't involved and doesn't have any interest in keeping space available for us after 22 years.

- Our organ is still not reinstalled since hurricane Rita. We need some assistance with building owners to get the chamber repaired so that we can put the pipes back in! (Jefferson Theater, BMT TX)
- By auditing its administrative and finance activities
- As with national, NEW BLOOD needs/must be allowed to get involved and serve (not just “grunt work” positions!)
- Institute a local chapter in West Palm Beach, Florida
- Crawford chapter is one that most of its members live no where near Billings, Montana. As far as I know, there are very few “local members.”
- Columbia Missouri is not yet affiliated with ATOS. I would like the Missouri Theatre Administration to be contacted by the ATOS. David white is artistic director. ([www.motheatre.com](http://www.motheatre.com))
- Give more concerts
- Encourage our local amateurs to enter amateur TO competitions.
- Not sure – NorCal is a saturated area. We have produced successful conventions but locally we have such competition for cultural events.
- Form a chapter for our theatre pipe organ at Crystal Theatre, Crystal Falls, MI 49920
- Stability at national level. Less in-fighting and splitting. Maximize openness and communication.
- By securing the aid of young volunteers to participate in designing our future
- In places w/ no active chapters, write letters personally to each member asking if they are interested in forming a chapter. Then act on the response.
- Our organ is in a technical school and we are limited in our access to it. We are limited in our technicians and helpers and our number of players is dwindling. At the same time, our attendance and membership is growing. People really come out for the silent movies, but a good professional does not draw as many
- Perhaps create an outline/sample plan to help chapter achieve goals outlined in the #25 above
- ATOS and NCTOS to work together as a team instead of as two entities

## ATOS STRATEGIC PLANNING INPUT

To: **ATOS STRATEGIC PLANNING MANAGER**

From: \_\_\_\_\_ *ATOS Members Only*

Date: \_\_\_\_\_

SUGGESTED/REQUESTED ACTION: *Brief description (what, where, when, why, etc.)*

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EXPECTED EFFECT OF REQUESTED ACTION: *Check all boxes that apply*

(a) Reduce Costs,  (b) Streamline Activities,  (c) Improve Outreach,  (d) Assist Professional Development,  (e) Expand Membership,  (f) Preserve Organs,  (g) Maintain Heritage,  (h) Other \_\_\_\_\_.

PERCEIVED PRIORITY:

(i) Urgent *Action needed before annual strategic plan cycle*

(j) Routine *Action to be considered in annual strategic plan update*

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*All ATOS members are encouraged to contribute useful suggestions/ideas for helping the organization operate more effectively in pursuing its mission. This form supports an orderly process for capturing and utilizing member input. A program is being developed to recognize members who submit particularly valuable suggestions and ideas once they have been implemented. However, if you would prefer to be anonymous, please check this box.*

CASE ID.: \_\_\_\_\_ *For Strategic Planning Manager Use Only*

*Appendix 4: 21<sup>st</sup> Century Theatre Organ Inventory*

FROM: The ATOS Strategic Planning Committee and the Board and Staff of ATOS

Dear Chapter President,

While we all know of successful theatre organ programs around the country, yet the overall future viability of the theatre pipe organ faces challenges on a national level. In order to meet those challenges, ATOS is about to embark on a long-term plan. We intend to help your chapter keep the theatre pipe organs in your area a viable and important part of your local musical arts scene in the 21<sup>st</sup> century. In order to begin this course of action, we need your help.

A process will be established to indicate the types and amount of resources needed to achieve this mission. The first step is to create inventory of current instruments and their status in order to accomplish two major goals:

1. Offer national insight into and document the actual numbers of theatre pipe organs, their condition; how they are being used, and provide ATOS with a starting point.
2. Utilize this data along with systematic and measureable methods in seeking grant monies and fund raising to assist in this major effort.

In order for ATOS to shape a program to support your local mission, it is imperative that the enclosed inventory be completed and submitted to \_\_\_\_\_ no later than \_\_\_\_\_. We ask that you consult with your local experts in order to provide the information requested. A general summary of these results along with more detail on this plan will be published both online at [www.atos.org](http://www.atos.org) and in the Theatre Organ journal.

Please note that ATOS fully realizes that local efforts are where the brunt of work resides, and this long-term plan is being developed to assist you in your local mission. This is a significant opportunity for a team approach towards bringing the theatre pipe organ and its music to new musicians, technicians, and audiences well into the future. The first step is to share information, expertise and resources. We cannot do this without your involvement. Please share this announcement with your board of directors and your membership.

ATOS' overall motive is keeping the viability and strength of the theatre pipe organ and its future at the center of everything we do.

Regards,

Ken Double, CEO

Mike Hartley, ATOS Chairman

Doug Powers, Strategic Planning Chairman; ATOS Director



