

ATOS ANNUAL COMMITTEE/OFFICER ACTIVITY REPORT FORM (2013)

Name of Activity: Membership Secretary

Committee Chair/Officer Name: Donna Parker

Date of Report: June 12, 2013

1. Actions completed since the 2012 Annual Meeting: (Please bullet actions completed.)

- ✦ Worked with Jim and Judy Merry to learn tasks and processes of job
- ✦ Added lockbox transaction processing to membership renewals/new memberships
- ✦ Processed all checks and credit cards for membership (lockbox, website, and mail)
- ✦ Worked with members on charge-backs and credit card denials
- ✦ Managed UK membership account with Peter Collett
- ✦ Updated changes of address and membership information in member records as needed
- ✦ Provided journal mailing lists for each issue (bi-monthly) and postal info to printer
- ✦ Changed our membership renewal process, now included in the TOJ packaging
- ✦ Maintained donor database, and sent thank you letters
- ✦ Created membership lists for chapters upon request
- ✦ Prepared and worked with printer on annual Board of Directors election materials
- ✦ Managed ASCAP account and payment schedule
- ✦ Sent welcome letters to new members and sent latest TOJ, if applicable
- ✦ Managed missing TOJs with ATOS Marketplace and sent replacement issues
- ✦ Update all returned labels/covers from postal return service
- ✦ Sent brochures and information letters on requests through website
- ✦ Managed online questions and comments through website; distributed when appropriate
- ✦ Wrote condolence letters to member's families upon notification of a member's passing
- ✦ Managed Annual Fund Drive donations and accounting
- ✦ Processed special gifts/donations and corresponding acknowledgements/communications
- ✦ Processed online donations (website)
- ✦ Set up new matching gift program, and managed existing ones
- ✦ Wrote all necessary snail-mail correspondence when phone or e-mail is non-existent
- ✦ Worked with Greg Bellamy, IT Manager, on e-mail and website issues
- ✦ Worked with Mike Bryant on information for database update/redesign
- ✦ Managed phone and e-mail questions and comments
- ✦ Worked with Michael Fellenzer and Ken Double on e-dresses for e-mail communications/blasts
- ✦ Attended board and IT committee conference calls

2. Actions begun but incomplete since the 2012 Annual Meeting: (Please bullet actions begun.)

- ↖ Redesign of membership database with Mike Bryant
- ↖ Bring complete donation records into individual member records (new database)
- ↖ The ability to note multiple chapter affiliations in individual member records (new database)
- ↖ New welcome letter/packet to new members
- ↖ Work with Greg Bellamy on e-commerce on website for membership (immediate credit

accept/denial)

3. Goals to be reached by the 2014 Annual Meeting: (Please bullet goals.)

- ↖ New database completed and in use
- ↖ New member letter/packet completed
- ↖ E-commerce up and running for membership and donations processing

4. Amount budgeted for your committee: \$24,575

Amount expended by your committee: \$22,929.82

5. Comments:

I have truly enjoyed working with our membership in this capacity. There are so many facets to this job, and it is very interesting work. I am working on ways to streamline processes in general and make the work flow go more smoothly.

Judy and Jim Merry have been tremendous helps through this first year. They are very dedicated to ATOS, and their assistance has been invaluable. Mike Hutcherson has also been extremely helpful with learning the processes of the new lockbox system, and working together on the various accountings for donations, billings, reports, etc. I very much appreciate the patience and assistance from these individuals.

I was initially given a job description, but once the actual work began and I learned the various tasks, there were many more duties to perform. Jim Merry warned me of this, and he was correct. However, I have served on the ATOS Board for a total of 12 years, and I never understood anything but a small part of what this position was responsible for or accomplished, so I do not think this is to anyone's discredit.

The work is important for both the organization and its members; all the duties tie together to serve our membership and our forward movement into the future. I would certainly like to continue to serve in this role for ATOS.