

At the approach of the TOS's centenary year of 2008, a review of the organisation's functioning was undertaken. After wide consultation of the members, a Plan of Action was formulated for the period 2008-13. The principal aim of the TOS Conference kindly hosted by the TS and TOS in America in July 2013 is to review this Plan, see what progress has been made and add new items. A second aim is to identify Plan items for application by conference participants in their national or local groups.

Immediately below, you are invited to read a summary of how the organisational review was conducted and how vision statements were formulated.

TOS REVIEW and PLAN OF ACTION

Background: THE REVIEW PROCESS

Phase 1: Identification of Needs and TOS Vision – TOS e-Group

Needs

In 2006, the International Secretary, Diana Dunningham Chapotin, informally engaged a small e-Group of key workers in different parts of the world in a discussion on the improvement of the international management of the TOS. A Survey/Questionnaire was developed around the needs and perceived Strengths, Weaknesses, Opportunities and Threats ('SWOT') in the TOS. Responses were summarised and a Report sent out to participants and other key TOS workers.

TOS Vision

Following on from the survey, members of the TOS e-Group were asked to contribute to the preliminary development of a TOS Vision Statement. Five statements evolved, encompassing different aspects of the ultimate destination of the TOS and consistent with the original vision of the founder, Annie Besant. It was decided that these statements should be reviewed by a wider group at the International TOS Conference hosted by the American TS and TOS in July 2007 at Olcott.

Phase 2: Refining TOS Vision and Needs – International TOS Conference, Olcott, July 2007

In the Conference programme, the statements of TOS Vision and list of TOS Needs from the Survey were discussed. Refinement of the five Vision statements was achieved and narrowed down to three; more needs were identified at the international level, and participants chose service areas in which to make their contributions. It was also accepted that even wider consultation with TOS members at the 'grass roots' would be beneficial.

Phase 3: 'Grass Roots' Consultation via National Directors

The International Secretary, with the National Directors and Correspondents across the globe, provided the opportunity for as many TOS members as possible to contribute to the ongoing Vision/Needs discussion. Results of this survey were collated and summarised by Dorothy Bell of Australia, and with the other accumulated responses, provided the basis for identifying initiatives for the coming years. These initiatives constitute the Plan of Action in this document. The Vision Statements were given to the task force working on the International Guidelines/Principles of Organisation for their inclusion in that draft document.

PLAN OF ACTION

2008 – 2013

In our organisational review, each of the following actions received overwhelming support, with many useful comments from the TOS workers around the world who participated in the consultation process.

1. Development of International TOS Charter/Constitution/Guidelines

Our International President has asked for a set of **guidelines/principles of organisation** for the TOS, outlining its foundations, purpose, structure, membership and relationship to the Theosophical Society.

Volunteers to draft this document for submission to the International President: Dorothy Bell (Australia/USA); Betty Bland (USA); Lorraine Christensen (Canada); Diana Dunningham Chapotin (France/USA); Vicente Hao Chin Jr (Philippines); Carolyn Harrod (Australia); CVK Maithreya (India) and Elizabeth Smith (Canada).

Progress: A set of "Principles of Organisation" was submitted to the International President and Vice-President in May 2012 and approved after minor modifications. So far it has been translated into Spanish, Portuguese, Italian and Slovenian.

2. Staffing International Secretariat

It is felt that a team is needed at international level to support the management of the TOS and the expansion of its work. The current, officially recognised structure consists of the International President, the International Secretary, the Spanish Language Coordinator and the volunteer bookkeeper who prepares a financial statement of the Secretary's expenses once a year. An increasing number of individuals from the TOS worldwide e-Group now devote considerable time to the work at international level. Should work be acknowledged and official roles attributed? Should committees be formed?

A possible management structure will be drawn up by Diana and Carolyn.

For example:

- International Secretary
- Assistant to I.S.
- Treasurer (excluding book-keeping)
- Finance Advisory Committee
- Emergency Relief Committee
- Policy, Planning and Review Group
- Webmaster
- Publications Officer
- Translation coordinator
- Mentoring and advisory group

Progress: *Diana and Carolyn report that an international team has emerged naturally and spontaneously over the past five years, without an official structure being designed and put in place. TOS members are 'action' people par excellence who, even more than most, often are not attracted to the administrative obligations and duties that tend to develop around a formal structure. Diana and Carolyn therefore recommend that the present system be maintained and roles and tasks assigned according to skills available. The Principles of Organisation allow for this flexibility through the creation of ad hoc committees and working parties. As the TOS grows, a more formal management structure may be required.*

The volunteer roles currently filled are:

- *Bookkeeper: Jacqueline Blouin (France)*
- *Webmaster: Geoffrey Harrod (Australia)*
- *Spanish language coordinator to communicate on behalf of the international secretary and support the work in Latin America: Fernando Pérez Martin (Spain)*
- *Designers and editors for international publications: Riza Balino (Philippines); Vicente Hao Chin Jr; Carolyn Harrod; Ananya Rajan (USA)*
- *Proof-reader: Vicki Jerome (New Zealand)*
- *Advisors: Dorothy Bell; David and Betty Bland (USA); Lorraine Christensen (Canada); Vicente Hao Chin Jr; Carolyn and Geoffrey Harrod; CVK Maithreya (India); Fernando Pérez Martin; Ananya Rajan; Elizabeth Smith (Canada)*
- **Roles needing to be filled:**
- *an understudy webmaster*
- *a translation coordinator*
- *a skilled fund-raiser able to do grant applications*

3. Increasing awareness of the TOS's existence

The TOS is currently present in a little over half the number of countries where the TS is active. Much needs to be done to make Theosophists aware of the opportunity to participate in the TOS's work and to start groups.

In improving communication about the TOS and in encouraging participation, what actions can be undertaken? What materials can be assembled to help new groups start up – purpose-designed or taken from the existing range?

- **Introductory brochure 'What is the TOS?'**

Progress: Carolyn Harrod has designed one that is now available in our new publication, the TOS International Handbook, and on our international website.

- **Posters**

Progress: Using Annie Besant quotations researched by Dorothy Bell, Vic Hao Chin has produced two large posters on the early history of the TOS and its founder. Vic has also produced two large posters on the work of the TOS worldwide. These are all available on our international website.

- **Revised start-up kit for new TOS groups**

Progress: This has been completed by Ananya Rajan and posted to the TOS's international website under 'Resources: Start-up Kit'. Some of this material has been reproduced in the TOS International Handbook.

- **Outreach to TS General Secretaries and Presidents**

Progress: All receive the TOS's electronic newsletter as well as occasional additional announcements/invitations/offers, some individualised. The e-newsletter has made a big impact.

- **Outreach to countries**

Progress: Attempts are made periodically to identify persons willing to act as TOS Correspondents in those countries where the TOS doesn't exist. The TOS now has National Directors/Coordinators or Correspondents in around 30 countries. International lecturing on the TOS is a very productive method of outreach. Diana Dunningham Chapotin, Vic Hao Chin Jr, Sunita and C.V.K. Maithreya, Dorothy Bell and Fareeda and Aman Amir, amongst others, have all contributed in this regard but lecturing needs to be considerably extended.

- **Outreach to TS branches**

Progress: The TOS in some countries has made attempts to find TS members willing to act as TOS contacts in their local TS branch if there is no TOS activity there. The TOS in England now has 'TOS ambassadors' in seven of its branches, for example, and the TOS in America has 25 'liaisons'. This kind of initiative should give rise in the long run to solid local TOS groups such as exist in India and Australia. Lecturing around the country with a presentation on the TOS or service themes, such as that done recently by Cynthia and Atma Trasi in England, is a great help too.

A poster and a brochure that can be adapted for display in TS branches have been designed by Carolyn and are now available on our website and in the International Handbook. A PowerPoint presentation on the TOS is available in the 'Resources: Presentations' section of the website.

- **Formats/Materials for TOS presence and participation at National TS Conventions:**

Progress: TOS contributions to TS Annual Conventions vary. In quite a few countries the TOS AGM is held during the TS Convention. The TOS is also sometimes given a slot on the Convention programme to make presentations on a service-related theme or to report on national and international projects. This gives many TS members an opportunity to learn about the TOS's work. No material has been produced specifically for Conventions but the website now contains resources that could be adapted for this purpose.

- **Texts on the TOS for TS magazines including The Theosophist**

Progress: News items have been accepted recently for The Theosophist and specific themes for future submissions have been identified. National TS magazines in a number of countries are now regularly carrying TOS-related reports and announcements e.g. Australia and New Zealand. The international website and the e-newsletter provide lots of information, basic texts and reports that can be adapted.

- **Explore possibility of NGO status in United Nations:**

Progress: An international UN TOS committee was formed in 2010, coordinated outstandingly well by Lorraine Christensen of Canada. Members: Diana DC (NZ/France), Vic Hao Chin Jr (Philippines), Carolyn Harrod (Australia), Rekha Nahar (Bangladesh/Philippines), Victor Penaranda (Philippines), Ananya Rajan (India/USA), Nancy Secrest (USA), Pablo Sender (Argentina/USA) and Elizabeth Smith (Canada).

It was rapidly discovered that the TOS doesn't qualify for NGO status in the UN because it can't meet the requirements. For example, the international TOS body doesn't exist as a registered legal entity with bylaws. It in fact operates as a de facto, autonomous department of the TS. In short, we are not yet ready for NGO status.

Information on the history of the TS's support for the UN has been documented in a brochure entitled The Theosophical Society and the United Nations. See our website. It has been translated into Spanish, French and Bengali, with Assamese, Hindi and Gujarati translations underway. A second brochure is in preparation offering ideas for practical activities in support of the UN's work for world peace, unity and relief of suffering.

4. Development of international TOS publications

Includes:

- **The Service Link**

Progress: This was the major communication tool of the TOS but has been replaced by the international electronic newsletter which is costless and reaches far more people. Some have suggested that an occasional issue of TSL would be helpful to workers without access to the internet.

- **International Electronic Newsletter**

Progress: 26 issues have appeared since it was started in October 2008. It has been amazingly effective in bringing the TOS's wide range of service activities to the attention of the TS as a whole. There are currently over 1200 subscribers.

- **Official website**

Progress: The International TOS website was established in 2008. Since then, the content has been expanded steadily and today it has historical information about the TOS, news reports and an archive of electronic newsletters as well as electronic copies of some of "The Service Link" magazines. It has a photo gallery of TOS group activities, articles, information about TOS projects, an inspiration section of quotations, stories and videos and a 'Resource' section with material to support the work of TOS groups. The website is well used with 164,359 hits in the 12 months to March 2013.

- **A TOS handbook containing essential documents for national directors and local leaders**

***Progress:** An International TOS Handbook has been published. It contains information about the TOS, including the Principles of Organisation, examples of emblems used by TOS groups, a poster and a brochure that can be adapted for local use. It also contains a selection of inspirational articles and invocations together with practical suggestions for serving in our communities and for fundraising.*

- **Translations: Volunteer translators needed, particularly for the languages within India. Coordinator for Indian translation work?**

***Progress:** a number of members have done work. **Into Spanish:** Fernando Pérez Martin, Pablo Sender, Maria Rosa Martínez, Maria Ester Larraza, Idarmis Rodriguez and Raimundo Navarro Torres. **Into French:** Gérard Marc. **Into Bengali:** Mr BL Bhattacharyya. We still need a coordinator for Indian translation work.*

5. Increasing awareness of the nature of the TOS's work

The organisation is still perceived by some Theosophists as irrelevant to the central work of the TS (which for them is to make theosophical teachings available to the world). Comments in the 2006 survey revealed that the TOS is seen in some places as simply duplicating the work of other humanitarian groups and even as a drain on all-too-few TS branch workers. Almost no-one knows that the TOS's original name was "The Theosophical Society Order of Service". Much therefore needs to be done to clarify the nature of the TOS's work, its spiritual dimension and its role in the spreading of the teachings.

The main purpose of the TOS is to encourage members to take up the path of service to humanity and the planet. Its mission is to offer:

- a) a framework in which individuals may work in self-selected lines of service for the relief of suffering and the uplifting of society;
- b) a framework in which the practical application of theosophical principles to issues of contemporary concern may be explored;
- c) a framework in which social action as spiritual practice is honoured, supported and nurtured.

In improving understanding about the nature and function of the TOS, what is the challenge? What can be done within the TS to increase familiarity with the TOS so that its practical work is not regarded as separate from the educational work of the TS, but as one of two halves of the same whole? What can be done to ensure harmonious collaboration between the TS and the TOS?

***Progress:** A great deal of material has been prepared and published in the e-newsletter, the international website, the Handbook, the brochure on the TOS...To what extent is the message about the nature of the TOS reaching TS members, though? Are our active workers aware of the resources available on the website for raising awareness of the TOS? One example is a video of a lecture entitled 'On Root Causes and Symptoms' by Vic Hao Chin. Principles are outlined through which efforts to undertake reform can be more permanent and address the deeper causes of social and human problems. A free copy can*

be ordered through the International TOS or accessed through a link from the 'Resources' section of the TOS website.

6. Development of support materials for different lines of service

The TOS needs programmes and resource materials on which local and national TOS leaders can draw in their work of facilitating service within the TOS, within the TS and by individual Theosophists. For example:

- **Healing: circulation of the TOS healing ritual, of information about Therapeutic Touch....**

Progress: An electronic copy of the Healing Ritual is available upon request from the International Secretary. In addition, a healing meditation designed by Geoffrey Hodson is included in the International Handbook and on the TOS website. The Healing Network of the TOS in America now offers its services to members in other countries who appreciate being able to send names for circulation among its many groups. Diane Eisenberg and Ananya Rajan have designed a brochure offering the American Healing Network's services to the general public. It will be distributed in in hospitals, hospices, rehabilitation centres and nursing homes.

- **Service-related meditations/affirmations/visualisations/quotations**

Progress: A section of inspiring quotations, stories, meditations/affirmations and visualisations has been created on the website. There is a section of the latter in the TOS handbook too.

- **Animal welfare**

Progress: The Electronic Newsletter regularly contains articles on related topics and draws attention to opportunities for action in cooperation with community groups. Work has begun on compiling resources for children to sensitise them about animals.

- **Helping the dying**

Progress: The TOS has published and distributed a booklet written by Nelda Samarel entitled Helping the Dying. Copies have been sent to all TOS coordinators and offered to all TS Presidents/General Secretaries. It has been translated into Spanish and distributed as widely as possible in Spain and Central and South America. The booklet has been reprinted twice in the USA.

- **Theosophically-oriented funeral texts**

Progress: A section has been added to the website under 'Resources' containing examples of funeral services and suitable quotations.

- **Peace**

Progress: A collection of ideas for promoting World Peace Day and other peace events has been added to the website under 'Resources'.

- **Ecology**

Progress: The Electronic Newsletter regularly contains articles on related topics and draws attention to opportunities for action in cooperation with community groups.

- **Theosophical parenting**

Progress: An article on helping children deal with stress through meditation and mindfulness was published in the Electronic Newsletter.

- **Development of the TOS's relationship with the children's movement, The Round Table**

Progress: The TOS and the Order of the Round Table have cordial relations. There is regular collaboration in Chennai where Sunita & C.V.K. Maithreya associate the two organisations in their service work with young people. The TOS and the Round Table in NZ also share programmes sometimes. Members of the TOS in Colombia are taking Round Table ceremonies out to institutionalised children in order to engage them in a wholesome activity inspiring them with noble ideals.

- **Human rights (Amnesty International, etc.):**

Progress: The Electronic Newsletter regularly contains articles on related topics and draws attention to opportunities for action in cooperation with community groups.

- **Caregivers - support materials for, (including suicide support materials)**
- **Art: books, stories, plays, painting, sculpture, photography, music, etc.**
- **A compilation of books for children and young people with a Theosophical orientation**

7. Skills and inner development programmes and resources

The TOS needs how-to materials and/or workshop plans to:

- a) enhance management practices e.g. teambuilding skills, models of decision-making

Progress: The Handbook contains an article by Carolyn Harrod on the planning and development of projects.

- b) support the inner transformational process involved in theosophical service or action e.g. Use of healing ritual, seminars, retreats on spirituality and service; Vic Hao Chin's self-transformation seminar; train the trainer in Vic's self-transformation seminar; information on Dr Annie Besant's views on the path of theosophical service.

Progress: A great deal of attention has been given to emphasizing inner transformation in our core material, including *The Principles of Organisation* and articles in the TOS Handbook, as well as additions to our website in general. Just one example: an article by Dorothy Bell in the form of a conversation with Annie Besant, exploring her philosophy of service and its three-stage Path, has been posted on the website.

8. Development of financial management policy and procedures

Until the early 1990s, donations from TS and TOS members, either individually or in groups, appear to have remained restricted to projects internal to each country or else to have gone to various funds at Adyar, benefiting principally the work of the Olcott Education Society: the Olcott School, the HPB Hostel, the Social Welfare Centre and the Besant Memorial Animal Welfare Dispensary. More recently, donations have gradually broadened and increased to include support of TOS/TS projects in a small number of

developing countries, such as India (outside Adyar), Pakistan, the Philippines, Kenya and Brazil. Very occasionally they are made via the International Secretary but mostly they are sent directly to the projects concerned, with or without the Secretary's knowledge. This means that the international accounts of the TOS are very simple to keep. A volunteer book-keeper takes care of them.

Suggestions include the following:

a) that detailed reports be received on how donations are used;

Progress: *The International Secretary requires detailed reports from beneficiaries and sends updates to donors. The international e-newsletter now also provides reports on projects, following on from The Service Link.*

b) that criteria for selection of projects for support be made explicit;

Progress: *The following criteria guide the decisions of the International Secretary in recommending projects for support:*

- 1) *the character traits of the person responsible (common sense, discernment, realism, capacity to stick with the project over the long term, management experience and skills, relationship with co-workers, willingness to communicate regularly with donors, etc.);*
- 2) *the credibility, sustainability and impact of the project;*
- 3) *its theosophical component: does it embody theosophical values? Does it exemplify Theosophy in action?*
- 4) *visibility of the TOS or the Theosophical Society: does the project clearly identify the TOS or TS as a sponsor?*
- 5) *the project staff agrees to provide the TOS with a financial accounting of the donation.*

c) that clear procedures for the channelling of funds for emergency relief be put in place;

Progress: *A suggested process for rapid response to international disasters has been developed as follows:*

- 1) *National Coordinator/Director/President contacts the International TOS Secretary to ascertain any action being organised.*
- 2) *National Management Committee discusses the international advice and decides on any national action.*
- 3) *National Coordinator/ Director/President contacts local TOS groups and members and local TS Lodges by email re the situation and suggests action.*
- 4) *A corresponding notice is placed on the national TOS website.*

d) that ways of transmitting money internationally (such as Paypal) be explored and explained;

Progress: *It has been ascertained that the choice of way to transmit donations - bank cheque, bank-to-bank electronic transfer, Western Union, Paypal, etc. - is most often dictated by circumstance. Options are explored with donors on a case by case basis. They are told that the most economical way to send donations for international projects is via the national treasurer of the TOS who transfers a collective sum. It is also explained that while the use of Paypal for international transfers has increased, when over a thousand dollars is being sent, Paypal often becomes more expensive than an electronic bank*

transfer. Fees differ from country to country. Furthermore, Paypal requires that the receiving party has a Paypal account. In all cases, individual donors, treasurers and national coordinators are urged to consult with the International Secretary to ascertain the best way of sending money to a particular country or project.

e) that TOS workers be encouraged to identify funding sources within and outside the TOS.

Progress: *Because of publicity through the e-newsletter, there has been a significant increase in international collaborative projects and in donations. We nevertheless need to find in our midst a person with fundraising experience.*

There is no international treasurer but one capable of acting as a financial advisor would surely be helpful.