

Oregon Dressage Society Spring Board Meeting Minutes April 24, 2010 DevonWood Equestrian Center

Board Present:

Patty Armstrong

Siobhan Barker

Christopher Main

Gaye McCabe

Ed Miller

Jessica Rattner

Debra Ringold

Marsha Williams

Sharm Daggett

Rose Newman

Guests:

Corinne Stonier

Joyce Stride

Ginny Rattner

Kim Bilben

Meeting was called to order by Ed Miller at 10:10am.

Introductions: All present introduced themselves. Special thanks were given to DevonWood and Ginny Rattner for getting us online for the meeting.

Minutes from Retreat: Approved as amended.

Agenda: Corrections/additions made and approved.

Correspondence: Dressage foundation seeking donations.

Office Manager Report: Corinne Stonier

Membership renewals are still slowly coming in. We are now at 1060 total. There are no membership drives planned but there is a program in the planning stages to offer Purina coupons as an incentive/thank you for joining at this later date. There has been continued conversation/ongoing project to get our ODS member number printed on the USDF cards. It looks like it may not happen until 2012.

EXPO: Corinne made some great connections at the EXPO. She reported that Francy got reports from each of the demo riders and the consensus: They all loved George! (Williams). The atmosphere was great and the "Spectators Guide to Dressage" greatly enhanced the audiences' enjoyment. The riders' selections were also a great mix and enjoyable to watch.

It was projected that ODS got 40 new members and 2 business members as a result of the booth at the EXPO.

Publications: Printing costs for this year's publications will look to be considerably less than in the past, because we had an \$1800.00 credit on the (printers) books. It broke out at about \$3 per member compared with last year's cost of \$7. It is estimated that next year it will cost \$6 per member. We will be switching the printing to Laserquick.

Melissa Frazier proposed in writing that the test book be printed in the same format as the Omnibus and we would reprint only those pages that had changes. The consensus of the board following conversation was that the present booklet format remains as is. It is easier to use and is a tangible benefit that fits in your back pocket. The cover is also a coated stock that is slightly water resistant.

Someone asked if we could just link to the USEF tests (on our web site) and/or could we also post them to be printed on demand? The ODS Office will be looking into this.

*ODS pays a yearly "right-to-print" fee for the reproduction of USEF tests into our testbooklet.

* It was suggested we look into our membership for a member-owned printer in an attempt to lower our future printing costs.

Conversation continued: An issue brought up was that riders are being asked for their membership cards at shows. Since it is not listed in the Omnibus shows can't require them. It was also noted that riders don't need to be ODS members to show so many wouldn't have them for that reason as well.

ODS Insurance is an important issue. Chapters MUST apply for it in advance of their events. Presently, chapters are waiting until the last minute to apply, causing numerous adjustments/additions and extra work for the office and the insurance agent.

Corinne will be getting bids for our policy in August, as it is a slow process to get equine insurance. It is important to control insurance internally (through the office) as the alternative would us ending up having 17 individual policies!

She has proposed to:

1. Send one FAX per month into the agent to request coverage for chapter events on the second Tuesday of the month.
2. Have chapters submit requests 6 weeks in advance.
3. Pay to have clinicians be an ODS member and make events members only. Would reduce insurance costs.

*Charging a \$40 late fee does not deter late applications.

*Chapter presidents, show managers and event coordinators need to be educated about process.

*We can do this by posting it on the web site as well as through email correspondence. Regional Reps can take on this responsibility as well.

*It was also noted that insurance held by a facility (ie: Devonwood) does not cover ODS.

Treasurer's Report: Christopher Main

Christopher gave a thorough Treasurer's Report, going over the operating/central office accounting only.

Checking account balance: \$4,297.25

Savings account balance: \$3,596.96

Championship Show account: \$3,300.00

Education/money market cash account: \$35K+

Cash assets, office supplies

ODS Total: Aprox. \$55K

It was proposed by Chris that the ODS savings account at Merrill Lynch be closed as it is costing us more than it earns. Gaye seconded it. There was a vote, and the board approved closing the account and moving the money into our checking account unanimously.

Chris commented: "Cash wise, we will run out of money in the checking account and may need to shift money as needed."

Dues and where it all goes:

The last dues increase was in 2004. At that time, \$32.40 of the \$60 dues went unallocated to the ODS general fund. It was projected that in 2011, only \$29.00 of the \$60 dues will go unallocated. A \$4.00 increase would be needed to just keep even. (Comparison numbers in minutes from January retreat). ODS is actually losing \$10-\$15K a year. With fixed costs all increasing, if the ODS office were to support itself we need to increase income/money coming in by \$10K to take up up to the level we were at 2 years ago.

It was discussed and proposed that a dues increase be implemented to meet the loss and "holes" not yet itemized. It was essential to make the proposal during this meeting, as per ODS guidelines, to be able to implement the new number for the next membership year.

Chris made the proposal to increase dues to:

\$75.00 for Adults

\$55.00 for Junior/Young Riders

\$200.00 for Business members

\$125.00 for Patrons

Life members-honorary only, per board vote.

Also part of the proposal is to seek additional sources of revenue: Non-member fees, championship show, other chapters/show accounts. Financial committee to continue research on these options.

Proposal passes with necessary 2/3 vote.

Vote on dues increase will take place at next meeting.

Committee Reports:

Awards: Marsha Williams discussed how ODS Awards plaques are awarded for League Shows and ODS Recognized shows. Because there were still issues with the wording and also how Freestyle rides and group rides would be handled, it will go back to the committee for additional revisions.

The new policy for 2010 is to shift the awards away from the ODS office. It will also become the responsibility of the rider to double check the ODS web site for the accuracy of their award prior to printing. Errors not caught will be the responsibility to correct, at their expense.

Youth: Gaye McCabe reported that Dressage for the Ages made \$1500.00. There will be a Jr/YR Show early August. High school championship show will be in Salem with both 4-H and OHSET rides. Gaye also is working towards greater outreach with Quarter Horse Youth programs.



Oregon Dressage Society

2010 Spring Board Meeting

Saturday, April 24, 2010 ◆ 10 AM – 2 PM
DevonWood Equestrian Center ◆ Clubhouse

Agenda

- 1) Meeting Called to Order - Ed
 - a) Introductions
 - b) Approval of last meetings minutes
 - c) Adoption of agenda
 - ii) Next phase
 - g) Banquet
 - h) Strategic Planning
- 2) Correspondence
- 3) Office Manager Report - Corinne
 - a) 2010 Membership Update*
 - b) 2010 Publications Review
 - c) 2011 Test Booklet Proposal*
 - d) Northwest Horse Expo
 - e) Insurance
- 4) Financial Report - Chris
 - a) Status report
- 5) Region 6 Director's Report
- 6) Committee Reports
 - a) Education* - Rose
 - b) ODS Shows - Rose
 - i) ODS Championship Show Committee Report*
 - c) ODS Awards - Marsha*
 - i) 2009 Rider Awards
 - ii) 2010 Rider Awards
 - d) Youth Programs
 - e) Financial Committee
 - f) Communications Committee
 - i) Annual Survey
- 7) Old Business
 - a) Sponsorships/Advertising
 - b) Purpose statement*
- 8) New Business
 - a) Committee memberships and functions
 - b) USDF Convention Delegates
 - c) Nominating Committee for next year's ODS Board Openings
 - d) Proposal for funding Judge candidates
- 9) Next Meetings
 - a) Summer Board Meeting - August 1 – Bend, OR
 - b) Annual General Membership Meeting October 23 or 24 – Eugene, OR
 - c) Fall Board Meeting - October 23 or 24 – Eugene, OR
 - d) Winter Board Meeting and Officer & Board Retreat - January 22 & 23 - Silver Falls Conference Center
- 10) Adjourn the Meeting

**please see written report*

2010 Membership Update

Membership

	4/22/2010	4/20/2009	4/23/2008
Adult	824	837	935
Junior/Young Riders	156	143	176
Patron	13	14	18
Business	29	19	27
Life	8	8	8
Add'l Family Supporting Member Adult	14	14	19
Add'l Family Supporting Member Youth	16	18	28
Total	1060	1053	1186
<i>First time members</i>	130	111	179
<i>First time youth members</i>	47	31	57
<i>Interrupted memberships</i>	77	54	66
<i>Not renewed</i>	276	410	289
<i>Not renewed - 2 years</i>	325	231	202
<i>Not renewed - 3 years</i>	220	192	192

Our membership is up to 1060 from 858 members at retreat (202 memberships). I believe that our budget is based on a goal of hitting 1100 members in 2010.

Since the last board meeting, the following efforts have been made to increase membership numbers:

- 1) A business member opportunity mailing to Oregon Veterinary Medical Association Equine Vets (sent out 40 applications) – 1 returned as a business member, 2 as primary adult members.
- 2) Chapters were sent lists of their non-renewed members are asked to contact them about renewing.
- 3) Five volunteers phoned non-renewed general members.

No further 2010 membership drive efforts are scheduled.

ONLINE MEMBERSHIP CARD UPDATE: Chad Compton of USDF's I/T department is again proposing to add the GMO membership number to their online cards for 2012 and having ODS be the "guinea pig" GMO to test it out – we have not heard back yet whether or not that will be approved (budgetary concerns).

2011 ODS Test Booklet Proposal

Hi there. I have an idea about the test book that we publish every year.

I propose that we make the test book like the omnibus, that is, it should be able to go into a small, three-ring binder. That way, when new tests come out we can send out just those tests, instead of wasting paper on tests that haven't changed. For example, this year, none of the tests actually changed. There was very little reason to send out new test books, though there was the addition of a test which could have been sent out by itself and people could add it to their binder.

It seems to me, that this may be a way to cut down on printing and shipping costs every year.

If you need any further information about my idea or have any questions, please let me know.

Regards,

Melissa L. Frazier

From Education Committee – 2010 Spring Report

The big thing that the Education Committee was involved with this spring was the selections of Demo Riders for the Northwest Horse Expo. The selection committee of 3 plus me, as mediator, had almost 40 videos to watch and make the selections from. It was great to have that many riders from all over the northwest interested in riding at this event. A total of 9 riders were chosen; 3 at First Level, 3 at Second and 3 at Third.

The actual event was great. Mr. Williams was a gracious individual that gave freely of his time and advice. The riders all gave positive feedback and I have asked all of them to write a summary of their experience. I hope to have all of them soon. Thank you to Rose for covering for me on Sunday.

The ODS Library has been moved to my storage unit. There are 2 videos out that Claudette checked out and I have checked out 2 so far. There are a lot of very educational videos as well as fun videos available to chapters and members.

The Twin Rivers Chapter will be hosting a freestyle clinic with Cynthia Collins this fall. Sharon Gerl is working on putting it together. I have shared the files from the last clinic with her to help with her organizing. They sound very excited about hosting the clinic.

On a personal note I thoroughly enjoyed the Saddle Fitting Clinic that the Mid-Willamette Valley Chapter hosted at Kathy Darneile's barn. I felt the clinic was very educational and that the clinician, Ilene Nessenson of 'Holistic Horse Bodyworks', did a good job of explaining the basics of saddle fit to the group. There were only about 12 attendees.

From Education Committee – Expo Summaries:

Dear Francy,

Here are my thoughts concerning the horse expo in Albany. I am so sorry for the delay and I want to thank you again for the wonderful experience. Feel free to edit as necessary.

First I just want to say how honored I was when I was selected to ride with George Williams. I am very grateful for the opportunity. I learned new exercises to apply to my riding when working on collection. He used spiraling in and out on a circle to bring the horses haunches under themselves to put the horse in a more collected frame. He also used many lateral exercises. Shoulder in, haunches out, half-pass, renvers, and travers were all used to encourage the horse to be more collected. A third exercise we performed were canter-walk transitions. These helped rock the horse back on their haunches for a more collected movement. These are some of the things I learned during the exhibition ride. I had so much fun and learned many useful exercises and would recommend this activity to everyone.

Sincerely,

Elliott Scroggins

I had a fantastic time at the Northwest Horse Expo as a demonstration rider for George Williams. I was selected to ride with the group demonstrating flying changes. George was great working with the three of us together and putting together a presentation that the audience could follow. I enjoyed the whole weekend. I spent most of Saturday volunteering in the ODS booth and meeting many different horse people from our area.

The demonstration ride itself was quite educational considering the three riders working at the same time and the fact that George's only knowledge of us was from our DVDs. That was also the only sticking point for me since some of my problems from when the DVD was made had been solved but he didn't know it.

This was a great experience for my horse. She got to work in a strange place with a lot of stuff going on without the pressure of test performance.

I really want to thank the ODS for everything they did to make the whole weekend go smoothly. We have some really phenomenal people working very hard for us.

Thank you all, Tedi Rae Paasch

As I pulled into the Linn County Fair and Expo Center with my Appaloosa mare, Risky, I was amazed at the mass number of trucks, trailers, and horses on site! We arrived a day early so that I could watch George Williams' Saturday lecture on collection exercises. I fully enjoyed watching his lesson and the demo riders were all fabulous. My friend and I also were able to watch the Hunter/Jumper lesson, some of Peggy Cummings, and the drill team. As I schooled my horse in the warm-up ring on Saturday, my mare had the most beautiful, puffed up, floaty trot she has ever given me when the drill team came in with their flags! No need for more engagement, my dear! I had a nice chat with one of the Extreme Mustang Makeover cowboys, and was able to watch the Saturday evening obstacle course. It was amazing what those people could do with these wild animals after only 90 days of training. Stuff that we could never do with our most seasoned dressage horses! The trade fair was larger than I could have imagined, and had fun chatting with some of the vendors. (my favorite new item was the vibrating pitch fork!)

George Williams was fabulous. He came into the stabling area before our ride and hung out with us, asked us some questions about our horses, pronouncing names, etc., and was readily available for any last minute questions ("full bridle, or snaffle?"). As a great prep for energy and impulsion, the "Arabian Nights" group warmed up with us in the outdoor arena. Once in the indoor arena, we were able to have a few minutes of more relaxed warm-up while Mr. Williams made his introductions to the crowd. Our lesson for the day was flying changes. My mare tends to get hot and strong after the first change, so he had us work on 10-15 meter figure eights, changing leads into the crowd, which helped back her off a little. I enjoyed watching the other two ladies as we took a break, because he had them do different exercises to fix other problems. Then he had me return, trying the changes at the end of the short diagonal. Then we attempted the task of two changes on one long diagonal! Ummm, brakes?? Mr. Williams' summary to me

was, "she really DOES get strong in those changes, doesn't she?", and suggested we keep working on the single changes until she relaxes more. Good plan.

I fully enjoyed watching and getting help from George Williams, and appreciate the ODS for picking me to be a demo rider for the Expo. The Expo itself was quite an experience! It will be one we will never forget (especially Risky, while visions of ghosts on horseback dance in her head)!

Allison Allbaugh-Cino

As a long time admirer of Mr. George Williams, I was both excited and nervous about riding in the Expo. My horse is young and sensitive and I worried about how she would respond to the Expo atmosphere. I was delighted that she settled nicely into the work after a few good looks at the audience. Mr. Williams was positive and clear in his instruction to us and did a great job making corrections to the riders while at the same time conducting his demonstration for the audience. His program was clear: introducing collection through a gradual increase of work that included voltes, shoulder-in at the trot and canter, simple changes, counter canter and finally into half-pass. I was impressed with Mr. William's kind and generous spirit with horse and rider alike and I am so glad I had the opportunity to ride with him.

Mary & Rheiny

Riding with George Williams was an amazing opportunity for me that I will never forget. It was an honor to ride for such an experienced and talented clinician as well as to receive good comments. I felt like Mr. Williams directed the lesson extremely well and was able to divide his attention evenly among myself and the other two riders in my lesson, while picking up on subtle details with ease.

I have been working on leg yields with my mare for a while now but I really appreciated his advice on incorporating the forehand turn into teaching my mare to yield to my leg as well as the importance of keeping her shoulders moving freely. Mr. Williams gave many simple exercises, such as the spiral in, spiral out, square forehand turn, corner forehand turn, and leg yielding down the quarter line, which were all helpful variations of the important concept of yielding off the leg. It was nice to use the same concept in so many different ways because it provides options for a variety of horses and accommodates their learning abilities. I especially appreciated Mr. Williams's patience with my horse as well as me as a rider. He was able to deliver a clear message that will help me efficiently teach all of the horses that I ride. I want to thank Mr. Williams as well as ODS and all of the people that were involved in making this experience happen. It was awesome!

From ODS Championship Show Committee – Board Report

Hello Ed – sorry for the delayed response on the committee report request. Though we have tried more than once, we (the committee) haven't managed to meet in person this year, but things are underway nonetheless.

So, the great news is that the entire committee is returning for 2010 in the following positions:

Jennifer Milburn	Manager & Chair
Mary Neal	Show Secretary
Biagina Lazaroni	Volunteer Coordinator
Helen Ferguson	Treasurer
Rose Newman	Official Hospitality
Sarah Diebert	Program Designer
Donna Edwards	Awards Coordinator
Melissa Frazier	Sponsorship/Vendor Coordinator
Patty Armstrong	Website Designer/Manager
Vicki Borkman	Vendor Hostess
Corinne Stonier	ODS Manager
Marla Santino	PR
Siobhan Barker	General Advisor

Our only change this year is that Siobhan won't be able to act as Food Bank Coordinator, due to her commitment to regional's, but she has some ideas on how to help us make it work.

We had two major issues that caused some complications at last year's show. 1) Parking on arrival day was a DISASTER, but thankfully, Marsha Williams has committed to taking over this operation for 2010, as long as Biagina recruits three additional volunteers to be on her parking team. 2) We had many complaints about bees throughout the weekend. DevonWood was trying to stay on top of it, but of course spraying a nest while competitors and their horses are around isn't a safe approach. I will work with the facility to do all we can to eradicate the bees PRIOR to the show, and then continue to work with them to manage the little beasties while we are on site.

Melissa Frazier is getting started with sponsorship recruitment for this season, and Patty Armstrong will soon start working on poster design and web updates.

I think that is about it for now. Please let me know if you or the other board members have any specific questions.

Have a great meeting – wish I could be there.

Jennifer Milburn

ODS Awards Committee

Proposal to update wording in regards to rider awards to:

ODS League Shows

ODS Plates/60% Award:

A small brass plate with rounded edges will be awarded to each ODS member in good standing who earns a score of 60% or better at Introductory, Training, First or Second Level in a single show season. Freestyles will be awarded on a separate plate. The plate is engraved with the horse's name, level of competition and number of 60% or higher scores in that show season. Scores of 70% or better will have a separate plate.

A personalized wall plaque is available for purchase for mounting the plates.

Members are responsible for checking the ODS website for accuracy before plates are engraved.

ODS Recognized Shows

ODS Plates/60% Award

A small brass plate with scalloped edges will be awarded to each ODS member in good standing who earns a score of 60% or better at Training Level or above in a single show season. Freestyles will be awarded on a separate plate. The plate is engraved with the horse's name, level of competition and number of 60% or higher scores in that show season. Scores of 70% or better will have a separate plate. A personalized wall plaque is available for purchase for mounting the plates.

Members are responsible for checking the ODS website for accuracy before plates are engraved.

Committee Responsibilities

The Awards committee, with training and assistance, will be responsible for collating scores for plates and the ordering and mailing of plates. An email will be sent to ODS members as to the date they need to check the ODS website for accuracy before plates are engraved.

Old Business – Purpose Statement

Excerpt from the ODS Articles of Incorporation filed Mar 21, 1972.

The purpose or purposes for which the corporation is organized are:

To preserve the Classical Equestrian Art from abuses to which it can be exposed and to preserve it in the purity of its principles so that it can be handed on intact to generations of riders to come.

The object of Dressage is the harmonious development of the physique and ability of the horse, to make the horse calm, supple and keen, thus achieving perfect understanding with its rider. These qualities are obtained through a progressive, systematic form of schooling.

The Rules of the International Equestrian Federation, F.E.I., and the American Horse Shows Association, the A.H.S.A., (*now the United States Equestrian Federation, USEF*)* shall govern all Dressage Tests and Events, of this Society, without exception.

The Society adheres to the thesis that Dressage, practiced properly, is an Art not a Sport.

The program of the Society shall be education and shall be designed primarily to offer a framework in which individuals can progress with Dressage schooling of themselves and their horses.

*Phrase added by Ed Miller 2-17-10

Chapter Reports

UVC 2008-2009 Activities

- Election of Officers – 2nd Wednesday of October 2008
- Monday Night rides – 1st Monday in October at Douglas County Fairgrounds
- Members Participated in N.W. Trail Horse Championships
- Business Meetings each month 2nd Wednesday – Except July
- Annual Christmas Party and Benefit Silent Auction – Proceeds to Cathi and Jeff Lowe
- January Business Meeting members write a goal or resolution for the upcoming year. These are read at the next years January Business Meeting.
- Members went to NW Horse Expo – Cheer Cassi Soule' and Mini "B" in Extreme Mustang Makeover
- April Dressage & Jumping Practice Show at Dodge Creek Stables
- April LeSaut Cheval P.C Benefit Dressage Show – Members volunteered
- Co- organized Debbie Spence clinics with Colliding Rivers Chapter
- Various dates for Cassi Soule' riding clinics
- June – 2 day Ride a Test and Practice Dressage Show at Dick and Bobbi Harper's
- August members volunteered our dressage arena and setting up for Douglas County Fair. Members also volunteered to scribe and score tests.
- Sept. 27 – 13th Annual HPHHP Benefit Poker Ride
- Sent a basket for silent auction @ Mini Convention
- Members help 4-H Horse Judging team for Douglas County.
- Publish a monthly membership newsletter.

Members Participation:

Douglas County Mounted Sheriff's Office

Help Douglas County Animal Control with horse rescue/neglect cases

Special Olympics

Douglas County 4-H

Extreme Mustang Makeover

North Willamette Valley Chapter News

NWV Chapter is organizing a meeting in May to discuss rider safety with particular attention put toward head injuries. The meeting is scheduled for Thursday May 20 at 6pm in Canby, OR. Our guest speaker Todd Gary, is with the Canby Fire Department and works with the Mollala High School Equestrian Team. With the events of the past month, we thought it was important to arrange this time for anyone who rides horses to better understand what it means to have a

head injury, signs to watch for and what to do in case of an emergency. We encourage all members to attend and bring a friend. Don't forget your helmet! RSVP to marlasa2002@yahoo.com or 503.522.5453

Regards,

Marla Santino

Columbia Chapter News

Our Chapter Dinner at Tapitio Restaurant was a huge success with many in attendance. The Lecture Series was continued with emphasis on "the Outside Rein Contact" and "Connection over the back". A great discussion with many personal tips from other riders were shared.

We planned to help Debbie with the Columbia County Fair and the Dressage Demonstration this spring. We are still looking for two more volunteer riders to demonstrate the levels. Debbie has had riders for Intro, Training, First, Second and Third Levels demo a test at each level. We would like to do this again this year.

A Ride-a-Test is being planned by the Chapter at Horsin Around Stables in Banks in which the proceeds will go to help benefit the Handicapped Program there. Dates are being discussed and judges considered. Anyone who wishes to volunteer to help support the Bradley Handicapped Program with the Ride-a-Test, please call Debbie at 503-366-9201.

Thanks!!

*Debbie Spitzenpfeil
Silverhorse Farms
503-366-9201 office
503-502-0474 cell*

State of Jefferson News / Save the Date:

The STATE OF JEFFERSON Chapter has plans in place to host Alexandra (Sandy) Howard for a RIDER BIOMECHANICS Clinic/Seminar this summer. The three days are geared to educate not only the eight demonstration riders but especially the auditors. In the daily "classroom" sessions Sandy will talk about rider biomechanical concepts through lectures and auditor participation. A dvd supporting and demonstrating her teaching concepts will open the first day.

On the second day she will present and incorporate principles of "deep practice" or mylenazation of neural pathways to help make correct rider biomechanics a reality for participants based on the book, "Talent Code" by Daniel Coyle. The book will be provided at a discounted price to all participants. In addition to the lectures will be the opportunity to observe the eight demo horse/rider combinations assimilate and put to use Sandy's techniques. A Violet M. Hopkins Grant from The Dressage Federation is helping make this educational opportunity available to our Southern Oregon dressage community. Each day will include a complimentary lunch for all participants and the "classroom" lecture, visuals and unmounted demos under Sandy's guidance. The location will be in Gold Hill right off I-5 at Madrone Hill

Farm midway between Grants Pass and Medford with convenient accommodations for out of town auditors. The dates are July 30, 31 and August 1. The facility provides a large covered arena with protection from the elements and the hosts' gracious home for lectures and socialization. For more information or to reserve a spot please contact Carol (541)846-9495 or at <taylor@connpoint.net>

Chehalem Mountain Chapter News

Hey Everybody,

Thanks to Sharon Knowlton for helping us to get another saddle fitting event with local veterinarian and participant in a Master Saddle fitting program, Jennifer Stoffer! This time we will have a live demonstration with a real horse at Suzi Ronning's Thornhill Farm 29895 NE Wilsonville Road, Newberg 97132, Saturday, May 1. (this will replace our usual 1st monday of the month meeting). We all learned a great deal from Jennifer's lecture in January, but come see it hands on! BRING your Saddle too! Jennifer says "The more saddles present the better- for demonstration purposes regarding fit, as well as evaluation for repairs and reflocking."

We'll start the demo at 5:30, but I'm going to show up early with some food (main dish of some sort)!! Bring a treat with you to share and we can make a great evening of it! We *may* also have a tack repair professional joining us to learn how to save those expensive necessities!

Let me know if you have any questions and we'll see you there!!

Lou Anne

503-929-2225

Oregon Dressage Society

From: claire evans [eclaire56@verizon.net]
Sent: Wednesday, April 07, 2010 3:41 PM
To: Randie Croshaw; Chris Main; Dolores Morgan; Rose Newman
Cc: Ed Miller; Corinne Stonier
Subject: Financial Review Committee
Attachments: Scope of Review 4-2010.doc

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Members of the ODS Financial Review Committee:

You have been commendably patient in waiting for this communication. Thank you for volunteering to participate in this important review of the ODS financial structure and health.

Attached is an **outline** that is intended to provide a framework for our project. This scope of review reflects my conversations with Chris Main, ODS Treasurer, after he completed his review of ODS finances and preparation of the tax filing documents, as well as with our president Ed Miller. First and foremost, let us remember that the end result of our financial review should assist ODS in meeting the stated financial goal in the strategic plan, which I copy here:

Strategic Initiative #1

Create a responsible financial plan that meets present and future needs.

Goals:

- A. Develop an annual budget that is reviewed by the president at least quarterly.
- B. Establish a financial oversight committee consisting of both board members and non-board ODS members to institute an in-house auditing and a financial forecasting process
- C. Increase the number of sponsorships for ODS-owned events by 10% and for ODS publications by 10% each year.
- D. Increase the funds in the Linda Acheson Memorial Education Fund to the level at which the interest may be used, with criteria for dispersal.
- E. Establish a Chapter Support Grant Fund of at least \$2000 for the purpose of aiding chapters to bring clinics, seminars, and other programs to their areas with criteria for application and dispersal.

While our committee is not expected to achieve each of these points, the information that we research and the recommendations that we make should help the Board in taking meaningful steps to achieve the other elements of Strategic Initiative #1. To the extent that we can develop an accurate picture of ODS finances, relate income to expenditures, and assess the structure of ODS funding, the essential elements will result for a forecasting process.

Two weeks remain before the next ODS Board Meeting. I will present this outline at the meeting on Saturday, April 24th, and at that time we can look at some dates for phone/email meetings in the next couple of months. In the meantime, please share your thoughts on the attached Scope of Review, feel free to ask questions, and if you have access to sources of data (for example, Rose sent me a file on balances in various show accounts) and would be able to forward that information, that would give us a leg up on the project (no pun intended!).

Thanks so much, and I look forward eagerly to working with you!

Claire

Claire Fronville Evans
81 Kingsgate Road
Lake Oswego, OR 97035
mobile: 503.459.6837

Oregon Dressage Society Financial Review Committee
Proposed Scope of Review

1. Review Use of Funds

- a. Analyze different levels of expenditure, including annual totals by use
 - i. Central HQ/ODS Office expenditures
 - ii. Chapter expenditures
 - iii. Programmatic and Show Committee expenditures, including:
 - League Show
 - Championship Show
 - Breeders Show
 - Youth Team Program and Show
 - Adult Team Show
 - High School Program
- b. Identify location and authorization of funds (bank accounts, trusts, memorial funds), whether held at ODS Headquarters, by chapter, by Committee
- c. Analyze frequency of transactions, bank charges, and internal procedures to monitor and report on funds use
- d. Does use of funds meet purpose and objective?
- e. Aggregation of reports on use of funds to Board – how often? By whom?

2. Review Source of Funds

- a. Systematic solicitation of funds
 - i. Membership dues
 - Allocation of membership dollars
 - Rate of increase vs. rate of expenditures
 - ii. Donations to Show, Education, and Program Funds
 - Does fund have statement of purpose?
 - Are appeals made regularly to ODS members and sponsors? By whom? Track record in annual donation levels?
 - What benefits are associated with giving to fund?
 - How are goals set for growth of fund? Use of fund?
 - How and when are reports made to the ODS Board on fund's goals, accomplishments, growth or disuse?
- b. Audit all ODS-administered funds and scholarships
 - Conduct inventory of all committee/programmatic funds and scholarship programs
 - Assess statements of programmatic purpose, goals and criteria for use of funds, including criteria for awards and scholarships
 - Recommend potential changes in maintaining/creating funds and scholarships

3. Funds Flow Analysis and Recommendations

- a. Use vs. Source of Funds – identify shortfalls and describe how certain sources subsidize other operations/programs
- b. Recommend schedule and format for financial reporting to Board to ensure comprehensive and inclusive financial analysis, and means to facilitate reporting
- c. Identify funds performance– i.e., lack of solicitation effort, need for systematic marketing of funds; consider marketing recommendations for increased solicitation
- d. Analyze potential need for increase in membership dues
- e. Consider centralization of funds at ODS Headquarters level and/or changes in reporting procedures to improve monitoring of funds and facilitate corrective action

Guidelines for Oregon Dressage Society Sponsorship vs. Advertising

Sponsorship

- An act of associating with another organization or cause by underwriting costs of operations or activities
- Identification of sponsor does not differentiate or favor any organization, its products or services
- Statements of sponsorship are not comparative (i.e., "The best car manufacturer in the USA")
- Nothing is expected in return, other than neutral recognition of support
- Sponsorship may not go to the private benefit of any nonprofit officer (remuneration)
- No political or religious association permitted
- If sponsorship goes to a 501(c)(3) organization, tax deductible in whole or in part

Advertising

- An impersonal form of communication about ideas, goods or services that is paid for by an identified party
- Seeks to promote an organization, product features and benefits, and services through persuasion
- Aims to achieve sales and communications objectives through brand awareness and image
- Attempts to influence feelings toward a brand
- A business expense
- Income from advertising is taxable business income

Guidelines for ODS Sponsorship

1. Sponsors provide important assistance to the Oregon Dressage Society in its mission to promote, educate and further the art of dressage. For that **primary benefit**, sponsors may be acknowledged and thanked in ODS printed programs, at shows, and on the ODS web site.
2. Sponsors may not seek to promote products or services, conduct fund raisers or promote sales. A sponsor's **principal objective** is *association* with the Oregon Dressage Society's mission and activities.
3. No comparative or competitive statements are allowed that may construe preference of any for-profit entity over another. ODS reserves the right to review and approve all submitted copy and images.
4. Depending on the level of sponsorship, sponsor benefits may include but not be limited to: signage, complimentary table and/or tickets, event program ad, on-site booth, and public address announcement at a show.
5. ODS will provide a letter acknowledging receipt of sponsorship but attach no market value to the gift.

Guidelines for Advertising in ODS Publications

1. Whether in a show program, annual publication or on the ODS web site, advertisers pay a fee to communicate a marketing objective. The advertiser has discretion over the content of the message.
2. Income from advertising in ODS publications must be accounted for separately from sponsorship income. Advertising income is taxable.
3. ODS reserves the right to accept or reject an organization's advertising due to the nature of the business entity, its target market, or appropriateness of the message.

Cash Basis

Ordinary Income/Expense

Income

	Sep '05 - Aug 06	Sep '06 - Aug 07	Sep '07 - Aug 08	Sep '08 - Aug 09	Budget 10	Dec 09	April '10
3010 · Membership Dues	70,678.00	70,017.05	53,307.80	62,881.18	1,000.00	31,455.77	60,278.67
3020 · Contribution Income Unrestricted	0.00	0.00	0.00	536.36	57,000.00	0.00	215.00
3025 · Education Fund Contribution	3,886.99	7,134.20	123.00	353.95	100.00	71.61	279.98
3110 · Advertising - Omnibus	1,845.00	1,930.00	1,946.50	1,733.42	1,200.00	721.83	921.88
3115 · Advertising - Roster	651.50	620.00	425.00	315.50	0.00	0.00	0.00
3120 · Omnibus Show Listings	3,748.00	3,885.00	4,067.00	4,252.00	4,000.00	980.00	1,800.00
3210 · Show Approvals	2,680.00	2,460.00	3,545.00	3,580.00	3,500.00	780.00	3,097.00
3215 · Futurity fees	125.00	160.00	37.50	-245.00	-455.00	-455.00	-290.00
3220 · Show & Event Insurance	-1,179.00	-588.00	-1,849.74	-2,359.00	-2,000.00	965.00	-1,864.00
3225 · Office processing fees	910.00	1,030.00	1,310.00	1,400.00	1,500.00	450.00	960.00
3230 · Award Program Fees	3,832.00	3,388.00	4,574.00	6,896.00	6,000.00	2,409.00	2,422.00
3520 · Championship Show/Futurity, net	12,607.66	-624.34	12,180.48	7,902.69	8,000.00	-50.95	8,449.05
3530 · Banquet (Fall Festival), net	194.46	1,724.50	-2,510.78	-874.47	-382.52	-382.52	-382.52
3540 · Silent Auction, net	2,078.08	3,439.88	3,753.00	2,148.00	4,071.23	4,071.23	4,046.23
3550 · ODS Breeders Group	11,255.00	14,885.00	6,784.25	575.00	0.00	0.00	0.00
3610 · Merchandise Sales	7,334.54	5,153.91	2,033.85	1,083.00	2,000.00	1,355.50	2,694.50
3620 · Publications Sales	1,147.00	1,012.00	920.00	430.00	300.00	40.00	170.00
3950 · Other Revenues	800.42	0.00	0.00	0.00	0.00	0.00	0.00
Total Income	122,594.65	115,627.20	90,846.86	90,608.63	84,833.71	42,411.47	82,797.74

Cost of Goods Sold

4010 · Affiliate Dues	13,658.06	18,274.82	250.00	9,826.00	8,500.00	10,485.00	15,686.00
4020 · Flying Changes Subscriptions	6,106.63	9,003.88	9,226.38	9,535.44	9,000.00	2,208.46	6,060.54
4110 · Omnibus Production	3,902.00	4,714.00	4,585.09	7,918.84	5,200.00	0.00	5,162.05
4120 · Roster Production	2,528.22	1,900.00	2,041.14	1,772.88	1,500.00	0.00	1,192.29
4130 · Test Booklet Production	2,450.72	2,231.56	2,566.04	2,634.75	1,250.00	1,000.00	2,186.22
4220 · Insurance	1,238.90	3,260.50	1,551.28	160.50	1,000.00	0.00	851.75
4230 · Awards Program	670.95	7,545.15	5,533.44	5,641.00	5,500.00	529.00	5,176.45
4610 · Merchandise purchsd for resale	8,415.90	6,320.20	145.40	514.00	2,500.00	1,929.30	3,272.18
4620 · ODS Library additions	121.45	0.00	0.00	0.00	250.00	0.00	138.31
4630 · ODS Judges programs & expenses	0.00	-1,839.85	224.18	0.00	0.00	0.00	0.00
4640 · Instructors programs, services	222.63	0.00	118.60	0.00	0.00	0.00	0.00
4645 · ODS Breeders Group Programs,	8,391.15	15,511.93	8,180.14	158.00	0.00	0.00	0.00
4650 · Connie Keith Adult Camps	0.00	0.00	0.00	0.00	1,000.00	1,000.00	0.00
4950 · Other Costs of Revenues	816.33	0.00	221.09	0.00	0.00	0.00	0.00
5000 · Cost of Goods Sold	43.24	0.00	0.00	0.00	0.00	0.00	0.00
Total COGS	48,566.18	66,922.19	34,642.78	38,161.41	35,700.00	17,151.76	39,725.79

low
26 to softer
very low
Budgeted
\$4000

Cash Basis

9010 - Interest Income	270.89	259.16	95.52	14.30	5.00	0.14	0.54
Total Other Income	<u>270.89</u>	<u>259.16</u>	<u>95.52</u>	<u>14.30</u>	<u>5.00</u>	<u>0.14</u>	<u>0.54</u>
Other Expense							
9015 - Interest Expense	149.27	111.98	90.51	130.51	20.00	6.96	23.65
Total Other Expense	<u>149.27</u>	<u>111.98</u>	<u>90.51</u>	<u>130.51</u>	<u>20.00</u>	<u>6.96</u>	<u>23.65</u>
Net Other Income	<u>121.62</u>	<u>147.18</u>	<u>5.01</u>	<u>-116.21</u>	<u>-15.00</u>	<u>-6.82</u>	<u>-23.11</u>
Net Income	<u><u>20,910.32</u></u>	<u><u>-6,198.86</u></u>	<u><u>3,090.82</u></u>	<u><u>-13,522.52</u></u>	<u><u>-13,848.94</u></u>	<u><u>-7,840.97</u></u>	<u><u>-4,988.40</u></u>

Oregon Dressage Society

From: Ed Miller [eamgroup@aol.com]
Sent: Thursday, April 22, 2010 4:48 PM
To: gotothebarn@bendbroadband.com; eamgroup@aol.com; sharm@wallowacounty.com; dqhorsestuff@comcast.net; siobhan@haywardfarm.com; jessica.rattner@devonwoodec.com; christopher@haywardfarm.com; rose_newman@yahoo.com; foxtrailu@charter.net; j-g.mccabe@juno.com; sjt89not@epud.net; office@oregondressage.com; plsa7000@hotmail.com
Subject: Fwd: ODS-proposal for additional membership category

Here is a proposal that Becky brought up at the Retreat. I think it has some real merit. I'd love to hear what you think.

Ed

-----Original Message-----

From: becky@oregonwireless.net
To: eamgroup@aol.com
Sent: Thu, Apr 22, 2010 2:42 pm
Subject: ODS-proposal for additional membership category

Ed, here is my suggestion for an additional membership category:

Associate Membership: Available only through local chapters (no general membership unattached to a chapter)

- Does not include membership in USDF
- Does not include subscription to Flying Changes
- Membership dues paid to chapter, and chapter sends \$\$ to ODS
- Only benefit from ODS is to be on the e-mail list
- Chapters may decide which benefits from their chapter would accrue to associate

members

- Chapters may assess dues above ODS dues

I would suggest that the ODS portion of dues would only be \$5-\$7.50 and that chapters assess what ever social dues they need to.

This category would be important for Chapters to build members and interest and enable those who are interested in dressage but not yet committed to explore the sport with out putting out to much money.

In our group alone, we have several individuals who have health problems which prevent them from riding but who have had an interest or participated in dressage through our club or others in other places. We value these people not only from a friendship standpoint, but one is an experienced show organizer, another has a terrific voice for reading tests, another feels too frail to ride but has a wealth of knowledge. We would like to be able to offer some kind of membership to keep them in the group. Others on our list are not yet committed dressage riders but are on the verge but are hindered by the expense of joining ODS at \$60.00 per year. While the price of ODS does not seem too onerous if your

commitment is there, If you have a family, it is not possible in these times to put financial resources into something that is not absolutely necessary.

If ODS has kind of a "starter" "holding pattern" "ease off" membership, maybe we could increase interest and ultimately increase full membership. I spent 30 years in retail, and the gospel there is that it takes 20 times the effort the get a new customer than to retain an old one.

Our chapter has a mailing list of about 63 individuals but only 8 paid-up ODS members. Many of these people like to come to meetings and participate in social events but our chapter and ODS gain nothing financially. We need to change this and welcome these people into ODS.

Becky Hamann

No virus found in this incoming message.

Checked by AVG - www.avg.com

Version: 9.0.801 / Virus Database: 271.1.1/2810 - Release Date: 04/21/10 23:31:00

Oregon Dressage Society

From: Ed Miller [eamgroup@aol.com]
Sent: Wednesday, February 17, 2010 5:09 PM
To: eamgroup@aol.com; gotothebarn@bendbroadband.com; christopher@haywardfarm.com; siobhan@haywardfarm.com; dqhorsestuff@comcast.net; plsa7000@hotmail.com; office@oregondressage.com; sjt89not@epud.net; j-g.mccabe@juno.com; foxtrailu@charter.net; rose_newman@yahoo.com; jessica.rattner@devonwoodec.com
Subject: ODS Purpose statement
Attachments: Purpose statement ODS Articles of Incorporation filed Mar 21 1972.doc

Hi again. We've had some discussions about the purpose statement in the original application of ODS. Christopher has managed to dig through all the old papers and has come up with the original Articles of Incorporation ODS filed with the State of Oregon back in 1972.

So far we do not yet have the original filing with IRS for the 501c3. I think it is important that everyone read the purpose statements (attached). There appears to have been some "creep" from the original purposes. I think we should talk about it a bit at the April 24 meeting.

Ed

No virus found in this incoming message.

Checked by AVG - www.avg.com

Version: 8.5.435 / Virus Database: 271.1.1/2685 - Release Date: 02/17/10 07:35:00

Oregon Dressage Society

From: Kaye Phaneuf [Phaneuf@Canby.com]
Sent: Monday, February 08, 2010 11:36 AM
To: donna.edwards@daimler.com; AndreaMarek@pamplincorp.com; siobhan@haywardfarm.com; Jennifer.Milburn@oregonstate.edu; ginny.rattner@devonwoodec.com
Cc: 'Oregon Dressage Society'; 'Jon Howell'; 'Carolyn Ritacco'; 'Randie Croshaw'
Subject: Fund raiser for Kathy Casey?

I just had a call from Kathy Casey. She was NOT approved for her 'r' dressage judge's license. (3 of the 11 candidates were approved, compared to zero from last year's class. Ouch!)

On the other hand, she didn't fail, either. She did pass the written test, and has been given additional hoops to jump through, to wit: a short list of judges has been drawn up with whom Kathy is to apprentice:

1. She cannot work with anyone on the list that she knows.
2. The apprenticing must be done outside Region 6.
3. The apprenticing must be done at Second Level, in classes of 6 or more entries.

I think all of you have been involved in supporting apprentice judges long enough to recognize some of the pitfalls in this plan:

- At the last minute, rider #6 will vet out, scratch or be eliminated, thereby invalidating the class for apprentice purposes.
- Shows large enough to guarantee sizable Second Level classes are likely to be large enough to not want to 'waste' their S judges on Second Level.
- Just finding out where her pool of judges will be working will require phone calls to judges that she, by definition, doesn't know. (Personally, I *hate* that part!)
- Finally, and the biggest obstacle for Kathy, these new hurdles will cost still more money. The apprenticing must be done outside our region, which means travel and lodging expenses for herself, in addition to scribe expenses – either she has to transport/house/feed her own scribe or locate and compensate someone local, rent/transport a copier, etc. And we won't even talk about the lost income if she can't squeeze these additional apprentice gigs in between and amongst commitments to her clients' lesson/coaching/showing schedules.

You all know that Oregon is down to just one dressage judge, with no one in the pipeline other than Kathy. I feel strongly that it is in the best interests of the Oregon dressage community to support Kathy's quest, and right now, the support she needs most is financial. Therefore, I am proposing a fund-raising campaign,

An 'r' for Oregon.

I'm cc'ing Jon Howell on this message, and hoping that he will advise us on how to make donating to this fund tax-advantageous. The rest of you are my 'go to' list of Oregon show management/movers & shakers. Unfortunately, most of our prize lists have already been published, so it's a bit late to offer specific classes as fund-raisers. However, I'm sure that with a little thought, we can all come up with creative ideas to help Kathy afford to meet these last requirements for her license. Donna and Andrea, how do you feel about these for *Spring into Dressage*? --

- Designate 1% of class entry fees for the *An 'r' for Oregon* fund
- Invite exhibitors to make a donation in lieu of collecting a trophy
- Set out collection jars at the show office and awards table

Kathy, of course, needs to do her part – find out where the judges will be working, which shows she wants to attend, and how much money she needs to get there. I don't particularly want to own the entire fund-raising campaign, but I can help with promotional items, posters, collection jars...

What do you think, folks? Can we help Kathy make this happen for Oregon? Can we buy ourselves an 'r'?

Kaye

Kaye Phaneuf

Fir Grove Farm
9377 S Barnards Rd
Canby, OR 97013
(503) 651-3037
Phaneuf@Canby.com

No virus found in this incoming message.

Checked by AVG - www.avg.com

Version: 8.5.435 / Virus Database: 271.1.1/2675 - Release Date: 02/08/10 07:35:00

Oregon Dressage Society

From: donna.edwards@daimler.com
Sent: Monday, February 08, 2010 12:28 PM
To: Phaneuf@Canby.com
Cc: AndreaMarek@pamplincorp.com; emt4randie@juno.com; ginny.rattner@devonwoodec.com; Jennifer.Milburn@oregonstate.edu; JHowell@dilocpa.com; jwrcir@aol.com; office@oregondressage.com; siobhan@haywardfarm.com
Subject: Re: Fund raiser for Kathy Casey?

Wow, Kaye. What a bunch of astute observations. Good for you for recognizing the bigger picture and long-term/ongoing implications for Oregon dressage - because at this time it only involves Kathy but if we don't do something to make this better, we're likely to never get new judges in the state.

It seems to me that establishing some kind of fund at the ODS (state) level to make assistance available for causes like this would be a good idea, going forward. For now, I rather like your suggestions - and would consider any or all of them for Spring Into Dressage (although I'd like to have Jon's response first).

Donna Edwards

Phone: 503.745.7719
Fax: 503.745.2196
Email: Donna.Edwards@Daimler.com

<http://www.daimler-trucksnorthamerica.com>

Phaneuf@Canby.com

02/08/2010 11:37 AM

To donna.edwards@daimler.com, AndreaMarek@pamplincorp.com, siobhan@haywardfarm.com, Jennifer.Milburn@oregonstate.edu, ginny.rattner@devonwoodec.com
cc office@oregondressage.com, JHowell@dilocpa.com, jwrcir@aol.com, emt4randie@juno.com
Subject Fund raiser for Kathy Casey?

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- Just finding out where her pool of judges will be working will require phone calls to judges that she, by definition, doesn't know. (Personally, I *hate* that part!)

Oregon Dressage Society

From: Jon Howell [JHowell@dilocpa.com]
Sent: Monday, February 08, 2010 12:31 PM
To: Kaye Phaneuf; donna.edwards@daimler.com; AndreaMarek@pamplincorp.com; siobhan@haywardfarm.com; Jennifer.Milburn@oregonstate.edu; ginny.rattner@devonwoodec.com
Cc: 'Oregon Dressage Society'; 'Carolyn Ritacco'; 'Randie Croshaw'
Subject: RE: Fund raiser for Kathy Casey?

Kaye, two thoughts –

1. ODS is a 501(c)(3) recognized charitable organization, so we should be able to make charitable contributions, as individuals, to ODS on her behalf and then ODS could make an educational grant to her. I'm meeting soon with Christopher Main, ODS's Treasurer, to prepare the 2009 returns for the Society, and I would be happy to go over the tax aspects of the idea with Christopher and obtain his views.
2. I have been talking with the other ODS HS Team coordinators about doing a combined Clinic + schooling show at our barn for the ODS High School Teams, probably in June after school gets out. 2 days of individual clinics on Friday and Saturday, then a schooling show on Sunday. Kathy has generously done several Clinics for the Teams, and she was one of the people we were talking about who would be a great choice for Clinician/Judge. I'd be happy to turn this into another fundraiser for the "An "r" for O egon" campaign. The HS Teams owe Kathy a lot for her support of our statewide Athletic Letter program. This would be a good way to give back.

Susie and I will of course make a cash donation for this worthy cause, as soon as it gets underway.

Thanks,

Jon

Jonathan G. Howell, CPA
DiLoerenz & Company, PC
jhowell@dilocpa.com
503-646-6696 Ext. 218
866-646-6696 (toll free)
503-626-2032 (fax)

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CONFIDENTIALITY NOTICE: This e-mail message may contain confidential and privileged information. If you have received this message by mistake, please notify us immediately by replying to this message or telephoning us.

From: Kaye Phaneuf [mailto:Phaneuf@Canby.com]
Sent: Monday, February 08, 2010 11:36 AM
To: donna.edwards@daimler.com; AndreaMarek@pamplincorp.com; siobhan@haywardfarm.com; Jennifer.Milburn@oregonstate.edu; ginny.rattner@devonwoodec.com
Cc: 'Oregon Dressage Society'; Jon Howell; 'Carolyn Ritacco'; 'Randie Croshaw'
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