

Oregon Dressage Society Retreat
February 4, 2012
Silver Falls Conference Center

Present: Board Members: Rose Newman, President; Gaye McCabe, President-Elect; Ed Miller, Past President; Chris Main, Treasurer; Claire Evans, Secretary; Corinne Tindal Stonier, Executive Director; Patty Armstrong; Rachel Merusi; Jessica Rattner; Carolyn Wesolek; Marsha Williams

Guests: Siobhan Barker; Robin Borg; Kathy Darneille; Sarah Diebert; Jennifer Milburn; Lorraine Nettles; Kimberly Ransdell; Marci Sanders; Audrey Staton; Joyce Stride; Laura Swenson; Elaine Thomas; Karen Turner; Natalie Mair Williamson

1. **Welcome and Introductions:** Rose Newman welcomed the attendees who then introduced themselves.

2. **Membership Workshop** -- Claire Evans

Claire led a brain storming session about ODS membership: what ODS does well, why people join, and why people do not renew. The ideas generated will help develop an online membership survey to be conducted in June 2012, with the intent of influencing the ODS membership drive for 2013. The list of ideas are listed in Appendix A.

3. **ODS Open and Championship Shows** -- Jennifer Milburn

Jennifer sought suggestions through a brain storming session about how the ODS Open and Championship Shows could revive their intended mission of being the main annual fund raisers for ODS. These two shows provide an important cash influx per year; Chris Main said that together they raised about \$9,000 in 2011. In 2004, although show fees were less, the net to ODS that year totaled \$12,000. When the shows were moved to DevonWood Equestrian Centre with higher costs associated, the net income dropped to about \$8,000. When entries are down, so is the net income to ODS: in two of the past eight years, ODS netted only \$3,500. Since becoming manager of the shows, Jennifer has perceived that the event continues to chug along on its own, but she believes that the Championship show weekend could fulfill its mission with greater amplitude as a fund raising mechanism for dressage. She then opened the floor for discussion about how to invigorate the ODS Open and Championship show committee with new energy and possibly new positions to sharpen the fund raising focus.

Jessica Rattner asked if the Fall Festival's enlargement in scope (instead of just the banquet) coincided with greater fund raising results, since it was uncoupled with the Championship Show weekend. Attendance at the banquet has not increased, Chris said.

In 2011, the show committee took steps (given higher expenses and a tight economy) to save money in as many areas as possible, resulting in net revenues from the event of about \$9,000 (up from \$3,500 the previous year). The vendor village at the ODS Championship Show has often resulted in disgruntled vendors who had hoped for higher foot traffic and better business. In an effort to reduce their vendor fees and save the show some money, it was decided a few weeks prior to the show not to order the expensive white vendor tents. Rather than pay several hundred for the weekend, the vendors were asked to bring their own tent set up and charged just \$50 per day, which the show was able to keep as revenue (rather than pass on to the event company as in years past). The committee plans to repeat this approach in 2012. The show committee also reduced expenses related to electronic scoring operations and e-scribing equipment. Despite DevonWood's reasonable fees in this area, hiring DevonWood Competition Services to run scoring and provide the IT equipment was cost prohibitive, since Christopher Main was able to create a scoring system that was supported by volunteers for the weekend, saving the show at least \$2,000; the show committee will likely reenact this scoring system in 2012 as well. Another source of savings in 2011, which will not be repeated, was a result of the ribbon order that was not completed

correctly or on time. The committee will only pay half, if any, of that invoice, which came to roughly \$2,500.

The show committee consists of the show manager (Jennifer), the show secretary, volunteer coordinator and sponsorship coordinator. These individuals are paid. Other roles that are filled *pro bono* are: show treasurer, poster designer, web maintenance and design, food bank coordinator, vendor hostess, awards person, and hospitality coordinator (taking care of judges).

Chris thanked Jennifer for refocusing the mission of the ODS Open and Championship shows on their original fund raising purpose. Laura Swenson asked about donations for the silent auction and whether those proceeds are recorded to the Championship Show account; Chris responded that the proceeds are reflected separately in the silent auction account. Corinne noted that consideration of transport and storage expenses for objects donated must be factored in as well.

Natalie Mair Williamson asserted that the qualification criteria for the ODS Championship Show are not well known. Discussion tossed about the idea that an increase in the show fee should be accompanied by better communication about how to qualify. Patty Armstrong is adding all qualification criteria to the web site this year. Natalie suggested some targeted email blasts to remind members about ODS shows, the process for qualifying for championships and where to go for specifics. Jessica wondered if the Championship Show could accept qualifying rides in the Open show of the preceding day, or possibly two days before. Timing of classes complicate this option, said Siobhan Barker, because ride times for the Championship Show are set by noon on the Friday of the Open Show. Siobhan emphasized that the issue of members knowing that shows exist is a different issue from educating them about how to qualify for championships.

Returning to the fund raising theme, some suggested that the shows' web site could be more explicit about the need for ODS members to support the championships through donations. Many members would probably rise to the occasion and support the Championship Show charitably for the good of the sport.

Ed asserted that all ODS shows should contain, on the prize list, information pertinent to qualifying for ODS Championships. This would be another way to encourage support for ODS. He then wondered if more communication about qualifying should be targeted on trainers? Siobhan suggested a poster listing the qualifying shows that could be posted in barns. Jennifer responded that the production and distribution of posters were formidable in the pre-pdf age, but that's different now, so perhaps that idea would work. Natalie urged that this multi-media approach -- posters, emails, web site -- should also include publicity about clinics and other educational programs. Sponsor listings on posters would be an opportunity to bring in more ad revenues, which Jennifer assured is being done this year.

Claire asked what areas of increased revenues are most likely: attendance? sponsorship? Jennifer said that the greatest potential for increase lies in show entries and sponsorships. Chris wondered whether there was a larger margin in sponsorships or entries? In 2010, 155 horses were entered bringing in \$17,000 in entry fees; in 2011, 120 horses raised \$13,000 in entries. By comparison, sponsorships brought in \$7,000 in 2011, similar to preceding years. More entries also entail higher expenses (another ring, another judge, etc.), but entries appear to have a wider margin.

Marsha Williams suggested that if encouraging more entries makes sense, with the Open day filled, why not mimic Region 6 and have open classes at the Championship Show? This might encourage people to bring in more horses, rent another stall, and pay more entry fees. The Championship Show is a fixed pool of potential entrants, so ODS needs to encourage the maximum possible number of entrants to attend. Jess wondered whether a schooling show element could be added in an additional ring with a judge who is an "L" program graduate (to keep down expenses), so League show competitors could come -- but this is not legal, several interjected. However, Rose said, adding opportunity classes would be a way of increasing entries while also reaching non-ODS members. Chris suggested targeting qualified riders to maximize turnout for the Championships. Jennifer asked Siobhan if this was a secretarial problem to add Open classes on the days of the Championship Show, and Siobhan replied no.

Since a large problem seems to be awareness among riders about qualifying, Marci Sanders said, how about a place on the ODS web site that tracks qualifying rides and allows riders to create a list of their show results? Ed suggested an app that could be downloaded. Laura Swenson advocated the insertion of a score page in the Omnibus for people to write in their scores, and that page could list the qualifying criteria for the ODS Championship, League and Region 6 shows -- essentially a show planner.

Gaye McCabe asked if truck companies had ever been solicited as a major sponsor, and Corinne confirmed that this had been done, but the exposure and sale of the displayed truck was not lucrative enough for the company to repeat. Drawing spectators is challenging at this time of year, Jennifer noted, due to the timing of the show after the start of the school year. Attracting volunteers for specific sponsorship management roles is difficult but critical, she added.

Laura wondered if there is a way to introduce a social event that makes the Championship Show a destination event? Ed noted that the awards banquet formerly occurred on the Saturday night of the Championship Show weekend, before it was relocated to the Fall Festival. Siobhan Barker underscored that we could come up with lots of ideas, but it always comes down to getting someone to take charge of the Great Idea. Jennifer considered the potential of leasing the DevonWood club house for an evening event, invite favorite ODS business members to showcase new vendor lines (i.e., from Kerrits or Gallops), and lure attendance with give-aways and party favors. Claire suggested asking local winery reps to participate in a wine tasting evening, with a percentage of any sales accruing to ODS. Kathy Darneille noted that breed shows have nightly parties that are very well attended and popular. Despite the popularity of such social add-ons and their success in attracting attendance, Jennifer wondered how much additional funds really get generated for the show itself?

Rose said that the rules of the Show Committee would lead her to appoint someone to chair that social destination event. Jennifer concluded that the committee needs to reach out to ODS membership and recruit for positions to assist with implementing these ideas. Rose asked if there are many holes on the committee. Jennifer replied that she has interest in the sponsorship coordinator position, but the contract needs tweaking. Critical positions yet to be filled are vendor hostess and awards person.

Next Step: Jennifer will craft some outreach pieces to solicit people to join the ODS Championship Show Committee.

Marsha wondered if a philosophical change of emphasis from winning to participating would broaden the appeal of the ODS Championship Show by reaching more people who would never go to Region 6 Championships, but they would feel great about qualifying for the state Championship Show. She suggested that contacting people and letting them know that they qualified, with perhaps some freebie, would create excitement about what a big deal Championships are and that they offer a fun opportunity to show.

Jennifer liked forming a message to be launched next week, in fact, that educates members about the thrill of qualifying for the state championship show, the importance that attendance provides to supporting ODS, and how special they are for qualifying. Getting the message out at the beginning of the calendar year is very important, said Jennifer. She also clarified that her professional position prohibits her from soliciting sponsorships for ODS, so the appointment of a sponsorship coordinator is critical.

4. Policies and Procedures Manual Workshop -- Ed Miller

Chapters are encouraged to use the ODS policies and procedures, although some have adopted their own bylaws. Ed explained the purpose and format of the ODS Policies and Procedures Manual, how it is organized, what it can do for chapters, and why it is to the chapters' advantage to follow the ODS Policies and Procedures Manual that governs the day to day operations of ODS. Updates to the Manual are posted on the ODS web site. Each chapter of the Manual is a separate document that can be amended by the Board at any time. The most important Chapter is V, detailing insurance requirements and forms.

5. **Additional Brainstorming** -- Carolyn Wesolek

Carolyn related a recent survey taken of Twin Rivers Chapter members about programs and practices. The feedback included:

- a) People volunteer for shows and events and sometimes they don't get communication from anyone on when/where they need to show up. We are talking about people who are not entered in the show.
- b) The Fall Festival and the Steffen Peters Clinic were great and the publicity was excellent.
- c) The 2011 Intro to the Tests clinic with Dolly Hannon at DevonWood was well done.
- d) We are making assumptions that people are going to the ODS web site for information but they may not be. For example, some members said that people saw info on the USDF web site about the L program, but there was no communication about it to the general membership.
- e) Please make notifications short and sweet; don't bury them and don't put too many in one email.
- f) Suggestion was made to do more things in the southern part of the state.
- g) Suggestion was made to engage in conference calls for the quarterly Board meetings so people don't have to travel so far.
- h) Question: For the Chapter News, do we need to submit that to the news@oregondressage.com email address now?
- i) Do the board emails that are sent out to the membership match up with the Facebook news?

Communication with Volunteers: Discussion began with how to set expectations so that volunteers are informed and show up on time at shows, and how to contact volunteers. Corinne said that a comment on the ODS Facebook page is not an appropriate channel to inquire about volunteer duties at a specific show. Do not assume that everyone consults email in a timely fashion. Ed noted that the excerpted article "Happy Volunteers" at the end of Chapter X of the Policies and Procedures Manual offers good guidance, and Rose urged show organizers to consult the bylaws. Chapters may have their own bylaws, but Corinne warned that not all of the chapter bylaws are on file in the ODS central office; this has implications with the insurance carrier, who interpreted separate bylaws on the chapter level as treating that chapter as a separate entity. A separate insurance policy would have been required for each chapter, if Corinne had not successfully prevailed. The central office is working on ensuring that chapters understand the importance of document retention and coordination with ODS central office on governance records and questions, including minutes and procedures, once guidance is provided.

Fall Festival and Intro to the Tests 2011 Events: These two educational events were successful because they opened up the judge's perspective and the trainer's perspective to not only riders and competitors, but also to people who concentrate on training rather than competition. Video presentations that break down the tests and movements are very popular. People seem to crave these educational opportunities. Jess emphasized that the USDF "L" program and the Instructor Certification Program offer concrete examples that help train everyone's eye and understand how showing relates to training methodology. Siobhan suggested a chapter event where everyone gets to play judge and appreciate the difficulty of judging and staying on schedule.

ODS Web Site and Information Dissemination: Regarding how members get information from the ODS web site, Carolyn reported that everyone they interviewed was online and received email, so these are viable forms of communication. Multiple forms of communication -- email, Twitter, web site, Facebook, mailings -- are important for reinforcement, noted Audrey Stanton. The plea to make communications shorter is certainly pertinent, Rose said. The ODS statement that appears at the beginning of each ODS email is too lengthy and discourages reading. Chris noted that there are options for recipients to receive more than one email in batches.

More ODS Activities in the South: Some interviewees urged that more activities should be in the southern part of the state. There will be more League shows this year, said Ed.

Board Meetings via Conference Call: The comment about holding board meetings by conference call or Skype can be very inefficient if people talk over one another, Rose said, speaking from workplace

experience. They might be conducive for committee business, but she hesitates to see Board meetings held by conference calls. Marsha noted that participating on the Board is a financial burden, particularly for people living outside the Willamette Valley, with no financial support from ODS. Chris observed that Board members can claim a tax deduction for mileage incurred by traveling to non-profit board meetings at the rate of \$0.21 per mile. Siobhan objected that chapters would be asked to pay for activities of general members who themselves are not members of a chapter.

Chapter News: Reports on chapter activities are incorporated into the monthly ODS Newsletter appearing in *Flying Changes*. Corinne stressed that those reports must be submitted to her by the 7th of the month; she compiles, formats and submits all ODS and chapter news items to the magazine.

Board Emails on Facebook: Finally, there was confusion over the meaning of the last comment. Carolyn said the question was whether all of the emails automatically go to Facebook. Corinne replied no, but whatever is posted on Facebook automatically goes to Twitter.

6. Additional Comments

- a) Laura wondered if AA and Open FEI classes could be held at the Championship Show? Pros are very important but AAs carry the club, said Carolyn. Rose said she will take this to the Show Committee.
- b) In addition to the existing annual award for the best printed newsletter, Laura further suggested the creation of a best chapter web site award. A sponsor would need to be lined up, and Corinne suggested submitting a proposal to the Awards Committee.
- c) Further to the discussion of the Championship Show and the challenge of attracting volunteers, Marci wondered if we might be able to launch a chapter competition to turn out the greatest number of volunteers. There used to be a financial incentive of \$100, said Siobhan, for the chapter that produced the highest number of volunteer hours. Sarah Diebert suggested a Food Bank award go to the chapter who donates the most food, or a free membership be awarded to an individual who donates the most food. Rose will take this to the Show Committee.
- d) Jess asked when she could propose a new youth program to the Board and was advised to do so during the next day's discussion.
- e) Jess also suggested that ODS might capitalize on the Olympic Games in 2012 by hosting a social event around the Olympics that includes viewing some of the televised coverage of Olympic dressage and a social event or professional commentary.

Action Steps

1. Jennifer Milburn will craft some outreach pieces to solicit people to join the ODS Championship Show Committee.
2. Rose Newman will present to the Show Committee the suggestion that Adult Amateur and Open FEI classes be held at the ODS Championship Show. She will also raise the suggestion about a Food Bank Award for the chapter or individual who donates the most food.
3. Laura Swenson will submit a proposal to the Awards Committee for a Best Chapter Web Site Award.

Respectfully submitted,

Claire Fronville Evans

Date: 23 February 2012