

# The Oregon Dressage Society, Inc.

## STRATEGIC PLAN

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*As approved by the board November 2009*

### **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.

## Strategic Initiative #2

*Improve communication among board members, between the board and the chapters, between the board and the members, and between ODS and the community.*

### Goals:

- A. Complete the Policies and Procedures Manual ensuring that the responsibilities and duties of all board positions, officers, employees, and committees are defined and institute a system of evaluating the performance of each
- B. Create a program for board orientation (Board Biz) that is mandatory for in-coming board members
- C. Develop a welcome packet explaining ODS governance, benefits, volunteer opportunities, chapters, website, and other pertinent information for new members
- D. Re-design the ODS website so that it is focused, informative, and easy to use
- E. Create a training program for chapter leadership (Prez Biz) that is mandatory for at least one chapter board member
- F. Survey the membership annually as a means to evaluate the performance of ODS as an organization and to ascertain the needs of the membership; analyze the responses and direct the survey results to the appropriate board member or committee for action
- G. Create a marketing/public relations plan for the purpose of growing and retaining members, increasing sponsorships, and exposing the public in general and in other equine disciplines to dressage
- H. Task the Education Committee to address the education needs of the members as identified in the annual membership survey (2008 survey identified more league and schooling shows, growth of the L-judge program and the instructor program, education for the amateur and senior rider as the members' top priorities) and to act on educational opportunities presented to ODS

# ODS STRATEGIC PLAN TIMELINE

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*2010*

## ***INITIATIVE #1***

Develop an annual budget that is reviewed by the president at least quarterly

Establish a financial oversight committee

## ***INITIATIVE #2***

Complete the Policies and Procedures Manual

Create a board orientation program (Board Biz)

Develop and administer an annual membership survey

Task the Education Committee to respond to annual survey results

## **2011**

### **INITIATIVE #1**

Increase sponsorships by 10%

Grow the Linda Acheson Education Fund to the amount needed to begin use

### **INITIATIVE #2**

Create a marketing plan

Create a program to train chapter leadership (Prez Biz)

Create a welcome packet for new members

Re-design the ODS website

Task the Education Committee to respond to annual survey results

**2012**

**INITIATIVE # 1**

Establish funding for Chapter Support Grants

**INITIATIVE #2**

Task the Education Committee to respond to annual survey results

# ACTION PLANS FOR 2010 GOALS

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## **Develop an annual budget:**

The ODS treasurer and the ODS administrative director shall analyze past revenues and expenses for all aspects of ODS finances and present a detailed projected budget to the Board of Directors prior to the start of the fiscal year.

*Responsible:* ODS Treasurer  
*Target date:* November 2010

## **Establish a financial oversight committee**

The ODS board shall create a financial oversight committee consisting of both board and non-board ODS members to conduct an annual in-house audit of ODS finances and to forecast areas of potential growth and loss, the financial impact of current and future programs, and to develop a pro-active funding strategy. The financial oversight committee shall report at the August board meeting starting in August 2011.

*Responsible:* ODS President  
*Target date:* November 2010

## **Complete the Policies and Procedures Manual**

The ODS president-elect, together with the administrative director and ODS president, shall complete the Policies and Procedures Manual which shall include position descriptions and duties for both board directors and regional representatives, ODS officers, committees and committee chairs, employees and key state volunteer positions. The president-elect shall also create an addendum to the manual addressing how and when performance evaluations shall be administered and including tools for self- and/or peer evaluations.

*Responsible:* ODS president-elect  
*Target date:* For completion of manual: January 2010  
For completion of addendum: November 2010

## ACTION PLANS FOR 2010 GOALS, *Cont'd*

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### **Create a board orientation program (Board Biz)**

The ODS president shall create an ad hoc committee to put together a board orientation program that educates new board members on the workings of the board including ODS governance, history, responsibilities, membership, finances, programs, and any other pertinent information. Board Biz shall be mandatory for new board members.

*Responsible:* Marsha Williams

*Target date:* November 2010

### **Survey the membership annually**

The ODS president shall appoint an ODS member to develop a survey to be sent out in December to determine member satisfaction, areas that need improvement, suggestions for dropping or adding programs, and any other material needed to ascertain the demographics, desires, and needs of ODS members. Survey questions shall be presented to the board in November for board approval, shall be sent to the membership in December, and a summary and analysis presented to the board at the March meeting.

*Responsible:* 

*Target date:* November 2010

### **Task the Education Committee to respond to survey results**

The Education Committee shall create a plan to address the educational needs identified by the member survey. This plan shall include cost and feasibility. The Education Committee shall present its plan and recommendations for board approval at the August meeting.

*Responsible:* Chair of Education Committee

*Target date:* August 2011