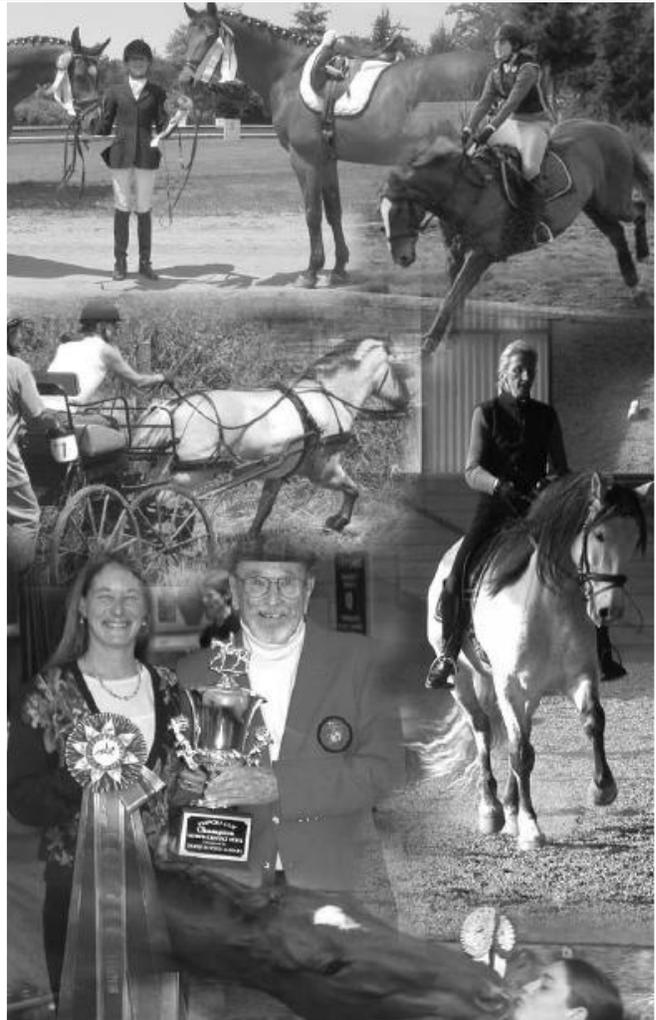


2009

E.I. Strategic Plan for 2009



For Equestrians' Institute

Prepared by

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1. Introduction

Every year for the last few years, the E.I. board of directors has spent time deliberately looking forward to improve E.I. services and adapt to changing conditions. The E.I. annual strategic planning session is a formalization of this process, and the organizational memory for how this is done is slowly being established as we stretch beyond just doing what we have always done. E.I. exists in a competitive world of recreational activities with other choices and we have to move forward just to maintain our position. E.I. has to respond to the most important priorities of our membership within our charter and constantly seek to improve the stability and effectiveness of the organization while providing a rich set of services that will grow the organizations reach. This document serves to:

- Capture work done by the E.I. board of directors in preparation for 2009
- Frame the planning for 2009 and beyond.
- Capture best planning practice basis future board of directors

2. Executive Summary

The E.I. membership grows and shrinks over time. In 2008, E.I. had approximately 430 members, but this group belongs to a larger group of occasional members of twice that size. Gaining more steady support from this larger group is a goal that underlies the whole planning process.

The economic crises dominating the fall of 2008, and other changing conditions such as urban development and increased environmental sensitivity, has influenced the outlook for the organization and its survival tactics.

The top three initiatives for 2009 are:

- Improving Fiscal and Accounting Discipline
- Recruiting volunteer and board positions
- Improve the use of Electronic Communications

These strategic initiatives are supported by a large number of tactical ideas which are listed in this document. The main aim of these initiatives is to continue to improve how the organization is run and better connect with the members it serves.

By focusing on E.I. fiscal discipline, we honor the hard earned dollars our members and participants contribute to E.I. and we become more cost conscious and effective as an organization. By focusing on recruitment on an ongoing basis we make the organization more robust to changing participation. By improving our existing electronic assets we can connect better with our existing membership and excite others to join.

3. Planning Efforts

In order for this document to help subsequent boards of directors, we describe our planning process in some detail.

The planning was kicked off by inviting randomly selected E.I. members to a focus group where a large number of topics were discussed under some time keeping direction. All major points from the focus group have been recorded and a small subset of issues was presented to the membership in a survey. This survey was presented online and responses were collected from 25% of the membership, 50% of whom also left verbose comments. The culmination of the 2009 E.I. planning efforts was a 6 hour offsite where the E.I. board went through a SWOT analysis followed by proposals of efforts to address the identified Weaknesses, Opportunities and Threats based on identified Strengths. The group then proceeded to vote on the most pressing issues and three areas were selected for special attention in 2009.

4. Focus Group Results

The following is a list of all the recorded points collected in the focus group of 4 E.I. members and two facilitators (Peter and Jana). Every item has a number at the end which corresponds to the original recording documents before the points were reordered for presentation.

4.1 Keep Doing

- I like the mission – think it is still appropriate for today. (1)
- It is great that organization is pushing for getting better improving strategic direction. (2)
- It is important to find venues for other shows – Remlinger? – Especially finding venue for one day winter shows. (3)
- I like shows and clinics. (4)
- I'm glad that we get refunds right away. (5)
- The prizes have been great. Like the volunteer gifts – tee shirts, goodies, lunch money. (6)
- I thought it was great that E.I. supported Donida and helped them make the changes. (7)
- People appreciate the recognition and acknowledgement at the end of the year. (8)
- Continue promoting education (9)
- I like the L program and instructor certification (10)
- I like that you are supporting education and provide these education opportunities (11)
- I like that you are providing local access to national programs (I judge/instructor certification training, etc.). (12)

4.2 Strategy

- Start offering a 5 yr membership like USDF (to reduce membership attrition) (13)
- Supporting new horse owners (to garner support from that community and start to bring them into the E.I. fold) (14)
- Supporting people or business that can bring in people to our base...We should make ourselves more approachable (to increase new member signup) (15)

- Build greater cohesion amongst leaders within the dressage and eventing communities (to strengthen the equestrian community) (16)
- Provide some kind of support or connection to horse community in areas like Snohomish (to reach out to equestrians on the edge of the core membership) (17)
- Offer shows and clinics on the 'edge' – there are lots of horses out there and they have a public arena, etc. Back Country Horsemen, Raging River Riders – maybe they could become a Chapter (to reach out to equestrians on the edge of the core membership) (18)
- Try to connect more with Whitbey (to reach out to equestrians on the edge of the core membership) (19)
- Attract master trainers to the area (to improve the quality of trainers/instruction) (20)

4.3 Shows

- Place recycling bins by all the garbage cans (to go green) (30)
- Scores & prizes – some would rather have money, others want the ribbon. Best to offer a combination of both. Maybe do \$10/ribbon for first place with five in the class (to make competing more attractive) (31)
- Provide an option to donate the prize money to a charity (to make money prizes more attractive) (32)
- Just staple rider packets together and/or send on-line ahead to time (to minimize waste, going green and leverage electronic facilities) (35)
- Provide better descriptions of show volunteer positions online (to make volunteering more attractive) (37)
- Acknowledge E.I./Lothar and Kellie in connection with Donida improvements (21)
- Split your big shows into two one day shows (to increase attendance) (24)
- Publish acknowledgements of national awards given to E.I. members, Pull the spreadsheet for medals, etc. (to promote the sport by announcing individual successes) (33)
- Introduce reusable numbers that are plastic (going green) (36)
- Offer shorter 1 or 2 hour volunteers shifts (4 hours is too long). That way they still get to see the show (to make volunteering more attractive) (34)
- I would pay more money for permanent stalls and for someone to clean the stall. Maybe offer graduating fees for types of stalls, location of the stalls, etc. (to offer differentiated show services to make shows more attractive) (29)
- Offer volunteers lunch with judges at shows (to maintain volunteer basis) (22)
- Offer one ring shows in winter (once a month?)(to provide more training opportunity) (23)
- Divide up the levels; Intro – 1st, and 2nd and above (to increase attendance). (25)
- Provide opportunities for equestrians to get off the property in winter (to make their showing more effective overall) (26)
- Provide list of all the schooling and recognized shows, due dates for entries (to provide a more comprehensive service) (27)
- Provide information about the shows and facilities, location, type of rings, specific for JRYR, what to pack for the show (to provide a more comprehensive service) (28)

4.4 Business Services

- Offer more business member promotions for show prizes (to connect businesses with our membership) (39)
- Provide something like USDF spotlights? But have it focus on barns or local trainers – give them more exposure (to promote local businesses) (42)
- Provide biz members get a certain number of e-flashes to use to promote sales, etc. for their business Would be separate e-flash w. signup (to connect businesses with our membership) (38)
- Provide a forum or message board for barn/property owners to share information about services, hay, etc., increase their ability to collaborate and reduce costs. (to improve the professional equestrian community) (40)
- Provide a forum or listing could also include information about the facilities (arena size, turnout, etc. (to promote local businesses) (41)

4.5 Communication

- Would like to hear about E.I. and strategic direction – push the information out (to better engage the membership) (44)
- Send out monthly updates about what is happening this month (to supply current information in push form) (49)
- Leverage centralized communications (to capitalize on 95% electronic membership) (51)
- Provide a newsletter. I miss the newsletter; it was great to get updates. I really liked the newsletter market place information see what is going on within the community. Newsletter was a personal touch (to better connect with membership) (43)
- More e-flashes about other events, get other shows listed on the calendar and other activities/clinics (to provide a more comprehensive service) (45)
- List books/resources on the website and horse handling/leading/loading horses safely (to provide a more comprehensive service) (46)
- Split information on website for pony club and adults (to better communicate to the younger audience) (47)
- Provide information about non E.I. clinics on website (to provide a more comprehensive service) (48)
- Advertise and promote local clinics – Can we have people host clinics at different place? (to provide a more comprehensive service, and create more opportunity) (50)
- Offer blog (to provide community leaders and pundits a forum) (52)

4.6 Education

- Emphasize how educational volunteering is (to increase volunteer participation) (59)
- Bring back our local characters like Nancy Benton, Sonja Varacko. They have much to offer and are well respected in other parts of country but we do not utilize them fully here (to capitalize on local assets who don't have to travel far) (56)
- Bring in CA folks or utilize local people – Lilo, Hilda, etc. (leverage regional talent) (62)

- Provide education in horsemanship – especially geared toward new riders/new to horses (to build a better base) (53)
- Provide education in how to work with horses safely, improve relationship with my horse, bring in people who are able to speak to folks at the beginner/lower levels (to build a better base) (54)
- Offer education about general horsemanship, new horse owners, safety, nutrition, etc. how to groom properly, pick an instructor, etc. (to build a better base) (60)
- Provide more “Ride and Reviews” – I need places to ride off the property in full size arena (to provide more training opportunity) (55)
- Provide a judges forum/feedback/ride & review (to offer more training opportunities) (61)
- Help support parents who want to get their kids started – maybe do ads for folks like Joanna Fowler or other pony club trainers. (how to buy horse, equipment)(to build a better base) (57)
- Provide video reviews with judges (to elevate the level of education) (58)
- Offer more instructor certification workshops and have more workshop format vs. preparation for certification. Gear toward general audience plus the instructors. (improve instructor level) (63)

4.7 Stop Doing

- Don’t force us to sign up 3 months ahead of time for recognized shows (to be more agile when preparing shows) (65)
- Don’t overbook the shows – Provide adequate staffing for number of participants so the office does not get way too busy and feels nagged when go in and ask questions. Sometimes don’t feel like a customer. (to provide more adequate staffing for big shows) (66)
- Don’t focus on promoting the sport. It’s rather insular – It’s hard to get outside folks to come watch and understand what is going on. (this may be a temporal situation compared to other countries where the public is much more engaged) (64)

4.8 Questions

- Tell us, What/who does E.I. give monies to? Can you share this information (include in renewal letter) (to provide full disclosure) (67)
- Tell us, do you sponsor riders or specific teams (JR YR) (to provide full disclosure) (68)

4.9 Comments

- Dressage is our main group and should have most of focus within the organization. (69)
- Happy with changes at Donida. It is great that people are listening and making the changes. (70)
- Word of mouth seems the best way to promote E.I. (71)
- See E.I. website as central source for information links to other resources – region six, eventing, driving – great books to read/references, etc. (72)

- See chapter schooling shows as growing ground for recognized shows. (73)
- USDF guide to Dressage by Jennifer O. Bryant (<http://www.jenniferbryant.net>) is a great book/resource. (74)
- We need to look at different options and pick one or two – otherwise get to many things going and lose focus. (75)
- Great web resources to copied: <http://www.eurodressage.com> and <http://www.dressagedaily.com> (76)

5. Online Survey

In order to test different ideas with the entire membership, select ideas from the focus group were put into an online survey. The selection process sought to include only ideas of a broader scope where it really matters what the majority thinks. Specific ideas for improving certain events are left as inspiration for event organizers. It was also decided early that the number of questions should be held to a minimum and that prizes for early responses should be awarded to increase participation.

The online survey was put together with 6 possible responses:

- Not Answered (0)
- I strongly agree (1)
- I somewhat agree (2)
- I'm indifferent (3)
- I somewhat disagree (4)
- I strongly disagree (5)

5.1 Questions

Q01: Would you be likely to sign up for a 5 year membership if we offered that option?

Q02: Is E.I. keeping you well informed about its decisions and inner workings?

Q03: Should E.I. offer more shows and clinics out on the edge of the core membership area?

Q04: Should E.I. work to provide more one ring shows in the winter (recognized or schooling)?

Q05: Should E.I. offer more education in horsemanship, grooming, nutrition, working safely with horses and improving

Q06: Should E.I. offer more “Ride and Reviews” all during the year, so you can get off the farm and train?

Q07: Should E.I. keep offering the instructor certification workshops?

Q08: Would you pay more money at the shows for more bigger stalls, better location and someone to clean the stall?

Q09: Should E.I. do more to inform you of shows, clinics and facilities in the area?

Q10: If E.I. offered a special electronic bulletin for business members, would you sign up to receive it?

Q11: Do you think it is important that the E.I. website becomes a comprehensive local resource for equestrian information?

Q12: Should we offer more specific information on the website to the younger audience and those new to horses and riding?

Q13: If the E.I. website offered you the ability to participate in forums and blogs, would you?

Q14: Should E.I. bring back the E.I. newsletter? - (it would be in electronic form)

Q15: Would you be more likely to volunteer if you only had to do 2 hour shifts?

Q16: Would you be more likely to volunteer if you could have lunch with the judges?

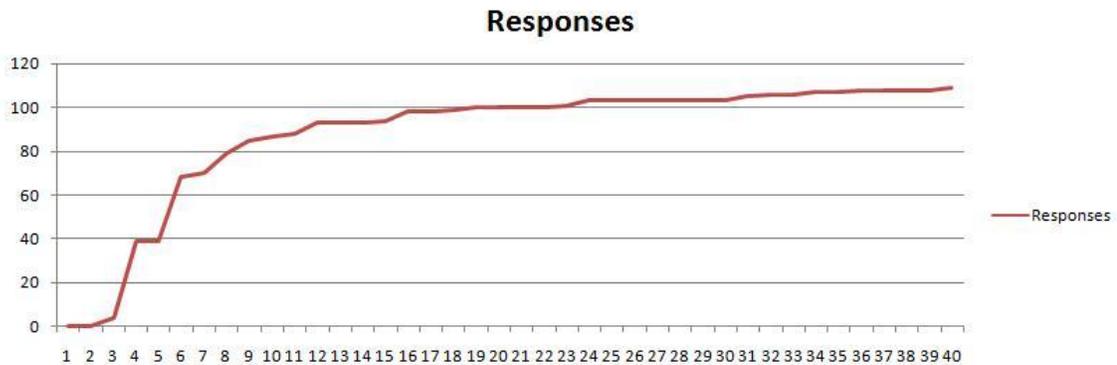
5.2 Ranked Responses

| RANK | Question | Notes |
|-------------|---|---|
| 1 | Q11 Do you think it is important that the E.I. website becomes a comprehensive local resource for equestrian information? | |
| 2 | Q06 Should E.I. offer more "Ride and Reviews" all during the year, so you can get off the farm and train? | |
| 3 | Q04 Should E.I. work to provide more one ring shows in the winter (recognized or schooling)? | |
| 4 | Q14 Should E.I. bring back the E.I. newsletter? - (it would be in electronic form) | |
| 5 | Q02 Is E.I. keeping you well informed about its decisions and inner workings? | Controversial with lower "Strongly Agree" and more "Disagree" |
| 6 | Q05 Should E.I. offer more education in horsemanship, grooming, nutrition, working safely with horses and improving | |
| 7 | Q15 Would you be more likely to volunteer if you only had to do 2 hour shifts? | |
| 8 | Q09 Should E.I. do more to inform you of shows, clinics and facilities in the area? | |
| 9 | Q07 Should E.I. keep offering the instructor certification workshops? | |
| 10 | Q12 Should we offer more specific information on the website to the younger audience and those new to horses and riding? | |
| 11 | Q03 Should E.I. offer more shows and clinics out on | |

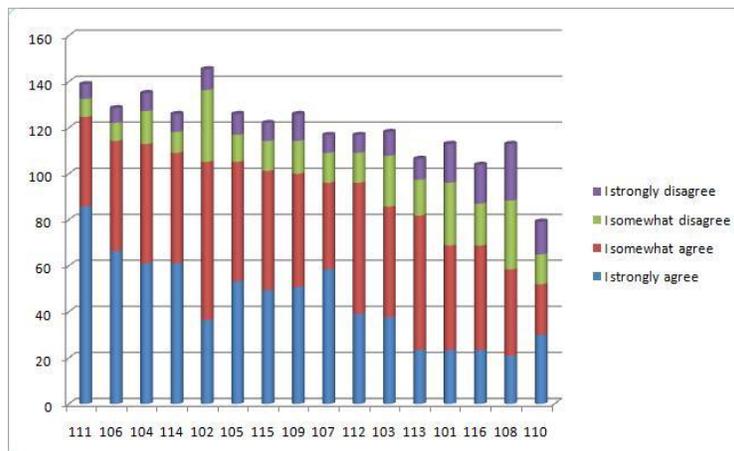
| | | |
|-----------|---|---------------------------|
| | the edge of the core membership area? | |
| 12 | Q13 If the E.I. website offered you the ability to participate in forums and blogs, would you? | Low "Strongly Agree" |
| 13 | Q01 Would you be likely to sign up for a 5 year membership if we offered that option? | Quite a bit of "Disagree" |
| 14 | Q16 Would you be more likely to volunteer if you could have lunch with the judges? | Quite a bit of "Disagree" |
| 15 | Q08 Would you pay more money at the shows for more bigger stalls, better location and someone to clean the stall? | Quite a bit of "Disagree" |
| 16 | Q10 If E.I. offered a special electronic bulletin for business members, would you sign up to receive it? | Poor interest in question |

5.3 Results

We had offered 5 saddle pads for the first 5 respondents and 5 to be drawn among the next 25 respondents. The survey got over 110 responses which is more than 25% of the membership. There were also over 50 comments in the survey (more than 50% of respondents). The responses came in pretty quickly after the survey and an e-flash had gone out to announce it. The graph below shows by every 6 hours the arrival rate.



The responses have been graphed below in stacked columns to show how individual sentiments affected the outcome. Note, the x-axis shows numbers like 111 which means question number 11.



5.4 Verbose Comments

- More educational short-seminars would be great!
- I like your addition of prizes to get us to do the survey ;) Thanks for all the hard work you do to run this and support of our equestrian community.
- I don't feel that a volunteer should be bribed with lunch with the judge, but do so to help EI keep the expense down at shows.
- One of the main communication tools we have is with Flying Changes...I think expanding on that partnership is important. That is where I go to find out what is going on locally. It is a great source of information.
- Feedback on show results
- Like the present feeling of EI as a sport horse organization, supporting the sports (training, learning, competing) as opposed to introducing people to horses (nutrition, grooming, etc.). Perhaps having a resource for people to help them with those needs would be helpful, but I like the current purpose (as I perceive it) of EI very much. Thank you for asking all these good questions!
- My ability to volunteer has more to do with the timing of my horse's test and the test times of horses I'm grooming. I like to volunteer and look forward to doing more soon.
- you will never get the judges to go along with lunches with them as it could create a conflict of interest as the rules state you cannot fraternize during the competition
- We need better venues for shows where footing is correctly done for warm-up rings and competition rings. I like the idea of the Conrad Shumacher Seminar for the spring. I would like to see some clinics/offerings on the Peninsula or on the West side of the sound. I would like access to training videos on line from EI as part of the membership. (Continuing education in electronic format that could be accessed at ones convenience. Thanks you for asking.
- I very much appreciate what Linda Mackin is doing with carriage driving. She is creative, delightful, and hard working. The driving events she's worked on have been wonderful, and she's planning even more in the future. Thank you!
- A good job overall. We're fortunate to have this organization.
- I think E.I is a great organization, but the reason I don't volunteer or participate in a lot of the activities is because it's always so far away from me. I'm in the South sound area and there is never anything going on in this area (through E.I) I'm feeling disconnected that way!
- I think in general EI is very well run, but it seems by championship time, there are a few that are extra cranky or the stress for such a big show is too much. My mare was actually stalled next to a Stallion this year and I did not find out until well into the show. Luckily it was a VERY well behaved stallion and my mare was not in heat. Maybe EI has nothing to do with the championships and that was why things felt different. Thank you for having EI and for all your hard work.
- Would be happy to see EI produce its own newsletter, but only if the editor is exceptionally proficient with the English language. Also, I love news of the more personal sort -- who's

- getting married, who's going to world events and will report back, who got a new horse, who scored a personal best -- all that kind of thing.
- Q1 - I am a life member. I find it helpful to receive email membership notices and prefer to pay electronically, or, pay for multi years (no cancellation/refunds) and receive a membership card with expiration date. I understand that multiyear memberships would require additional bookkeeping by the club. Q-3 Especially scribe training, understanding scribe notes, and biomechanics. Q-5&12 How to prepare for shows and rider awards qualifications. Q-7 Yes, with continued education requirements and a directory current certified instructors for EI Members. Q-8 I would pay more for a larger stall, I have already paid for my own tack stall. Location would only be helpful if I could camp in-sight of my horses stall. Q-9-10-11 Yes if postings were provided to EI with complete information. Q-15 A minimum should be mandatory by all members to qualify for awards. Q-16 Only if it were the volunteers lunch and a judge spoke on a subject or answered questions in a forum format. I participated in the Beaujolais and Champagne Classic. I would like to be able to buy a baseball cap or clothing embroidered with Event and year, a bottle of the signature wine, engraved memorabilia, jewelry, watch, halter tag, stock pin, etc.
 - I think generally, EI does a good job. I'd like it to feel more personal and less business-like sometimes. I'd also love to see more eventing functions-- it sometimes seems like we take a backseat to the dressage and driving folks.
 - We need to help riders find GOOD instructors. Too many "instructors" are persons who may be good riders, or previous Young Riders, but have had no instructional techniques taught to them, nor have sufficient riding experience at multiple levels to really be good instructors who can save the horse. We need to make a concerted effort to have all instructors, real or imagined, be active members of EI.
 - I would like to know about what our total region is doing. Articles about others achievements such as young rider news. I just found out that my friend earned a bronze medal at young riders and i couldn't find any information about what she did. I would have loved to read about her and our whole team. Thanks
 - I'm not sure where to address it, but my discipline has changed from eventing to dressage. Does that alter the info I receive?
 - I love EI, it is a great organization. Thank you for doing all that you do for our equestrian community!
 - Need to have a "back up" music system (such as a portable CD player with microphone close by) in case the regular one fails (as happened at the Champagne Classic)
 - E.I. should stay focused with what the mission statement is about. I think the E.I. folks do a great job and work hard. :)
 - Regarding questions 15/16... We usually volunteer @ shows. E.I. staff is very accommodating about the amount of time we volunteer for; as long as we have made the trek out to a show, we usually plan on a whole day of volunteering. Also, lunch with the judges is an interesting idea; but since shows are often chaotic, I think it would be a little difficult to pull off something that formal. I have always found the judges at the shows to be

- very "open" and welcoming. Maybe a little intro at the start would be good - that way we would all have formally introduced & judges would know who they could call on for help...
- #15, More attractive with the lesser more convenient time slot commitment. #14 I think that the coverage on the computer as it is covers the issues sufficiently for most. #11 #12 Could likely increase interest and membership. #09. My feeling is that EI is doing a pretty sufficient job of this already. #8 No. Stalls are big enough, expenses are high enough already, and we all know how to muck a stall. Cut cost give options. #7 Yes on certification. Would benefit all. Keep it tough. #4 primarily schooling would be good considering winter weather etc. #1 Already a life member
 - I like to scribe - but being forced to do it for four hours does not work. I like the 2 hour shift idea for volunteering - although I am not sure that would pertain to scribing.
 - Educational seminars and clinics would be higher on my list than more rated shows. Re: stalls at shows - bigger stalls - yes. Location and someone to clean stalls - no. Volunteering at shows. 2 hr shifts probably helpful for people showing. Otherwise, 1/2 day shifts are good. EI newsletter would be good - and could draw your attention to things on the website. The page in Flying Changes is not very enticing.
 - I live outside the core area so volunteering and regular participation in events is more difficult. I would do more if events were sponsored in my area. Bellingham/Mt Vernon
 - For those of us who really enjoy the learning process, I appreciate the informational workshops and clinics that have been offered
 - EI is doing a great job. After volunteering with another equestrian club this summer I realized how well EI's shows and volunteer coordination is run! It's a great group of volunteers!
 - I think EI has gone too far overboard in providing "prizes" for just about everything, including schooling shows. They take up too much \$ and administration, and too much time at the annual meeting (where attendance is poor, in part because of this). I think EI should continue to focus on its role as an "institute" of learning and skill-building. I also think it could be a more effective forum for issues facing the entire horse industry, such as rescue operations particularly in a tough economic climate. Good luck and keep up the good work!
 - EI is doing a great job. After volunteering with another equestrian club this summer I realized how well EI's shows and volunteer coordination is run! It's a great group of volunteers!
 - 5 yr membership - I would be agreeable if there was a discount. As for educational forums - I would like to see the Judge's L Education course offered. While I think it is great to have lunches with the judges I also believe the judges need down time.
 - I'm feel the website has become complicated and difficult to navigate. Time to revamp and simplify again. Time for the L program again. Every other year seems to work. Freestyles seem to be the most popular part of the sport for both riders and spectators. Can we invest in a proper sound system? Riders and spectators were very disappointed by technical difficulties this season. Competitors pay the bills.

- We need a proper sound system for freestyles. Very disappointing to pay to compete and scratch due to technical problems. I was delighted to see how many competitors were properly prepared with backup copies of music, when the sound system has technical problems. The web site has become messy and complicated. Simple is best. Another "L" program would be nice. Customer relations or service at the shows has improved, keep going thanks! As always do what you can to encourage facility managers to improve footing. Deeper is not better.
- I compete in Combined Driving and would do pleasure driving shows if they were offered. I don't feel that EI is as supportive of its driving membership. I think if more schooling shows and driving opportunities were offered EI would get more members from the driving community. This is one of the fastest growing sports in the NW. I know a lot of people in Oregon that drive, but have never heard of EI. I know we are not as large as the eventing and dressage disciplines, but more support would be welcome.
- With respect to the membership, I purchased a life time membership with EI as I thought that was the best value and EI actually offered one! Thank you. EI puts on three great shows during the year, and I would like to acknowledge that and thank you for your hard work and effort. Acknowledgement is seldom received, but complaints are always being given. Thank you for your hard work!
- Would suggest planning shows/clinics wherever you can find the best venues, not based primarily on "core" membership area.
- Since I'm fairly new to showing (this was my first year ever), I'm just getting into the swing of things. I do find the connection with E.I. very comforting as you are all so nice and helpful and put on schooling shows which I enjoyed. Thanks so much!!
- The rapidly deteriorating economy, it would be nice to focus on adult amateurs who work full time and do their horse's training themselves with non-traditional dressage breeds.
- I attended the education seminars offered (saddle fitting, first aid) and would like to see more of them offered. Thank you for all you do for our community.
- I'd love to get members' ideas on how to increase participation/volunteering
- # 14 I like being part of the news letter in Flying Changes. I think it contributes to E.I.'s overall visibility. However, I would like more written info on a monthly basis from the driving director.
- I think people would be more likely to volunteer if, after completion of their shift, they got a refund of a portion of their entry fees. Or after a certain number of hours of volunteering, they got their next year's E.I. membership pd for... some people need a monetary incentive to volunteer. Maybe you could have a volunteer "bank" where the number of hours logged in could add up and at the end of the year could be exchanged for something.
- Additional comments ...would like to see website more like Oregon Dressage Society's - I go there to find out what is going on, clinics, shows - would like to see something like that for WA
- I am from Bellingham. The last time I volunteered at the Champagne Classic it cost me almost \$300 in gas, motel and food. I would be low impact and love a "bed and

cereal/oatmeal option" to allow me to come to Seattle and help at a lower cost. We have our own WCEDA chapter shows and clinics up here. We do love it when we get visits from EI officers.

- Hi...on some of these the answer I gave would be mitigated with "it depends on..."...I think having a resource for those just getting involved with horses...where to get supplies...suggested list for outfitting yourself for 1st riding lessons etc. would be helpful....points people in the right direction...1 day clinics on feeding, nutrition, horsemanship would be great...but I think these have not been as successful in the past as we would have thought with the exception of the Hank Greewold one that Penney spearheaded...perhaps a resource list...books , trainers who offer info to beginners would be appropriate...as for 1 day shows during the winter...perhaps schooling...I think with the season ending in late Sept/ early Oct. after Championships followed by the Holidays you would be into January...would need to look at Gold creek and Donida's schooling show dates to not spread everyone too thin...thanks for taking the time to gather all the info.
- Whatever you decide to do or not do, I feel EI is a tremendously valuable resource for the equestrian community. Thank you all for all that you do.
- Would pay more for better location (footing improvements) but not bigger stalls or grooms.
- Hi, I'm not sure what email you guys have for me -- probably my old email but I can't remember! Good job Jana & Peter on making up the survey... these questions seem on target. I'd only quibble with Q11 -- I don't really know what you mean by "comprehensive" because that's rather too broad to be useful. I really want EI to have the website absolutely up-to-the-second accurate w/ comprehensive show & clinic schedule so I don't have to pick through 5-6 websites every spring to find out all the contact information, deadline dates, etc. It would be also fantastic to have a summary of the facility where the show is being held (i.e. hogsfuel footing, warm-up arena is indoor 60X140 arena, no lunging area, concession coffee and pastries available, flush toilets available vs. porta-potties, trailer camping space, etc etc) so I can plan out my show strategies & travel plans really carefully. All those details matter a lot every single year and we're always forced to work with imperfect information that really affects the rider/horse experience. I'm happy to help put this we! b section together or at least help plan it out, let me know who to call.
- Should offer a discount in membership to USEA members as we already receive Flying Changes.
- My only equine competition is Combined Driving Eventing. As an EI member, I know that I'm somewhat of a redheaded stepchild anyway. (All of us in this discipline are, but we're ok with that.) Subsequently, I don't pay a lot of attention to most of what EI does, since it's not geared for my interests. However..
- It would be helpful for me to have an idea of upcoming driving events that EI is involved with, even if it's just rumors or ideas, not necessarily firm dates, so that I can help out if needed, or try to plan my calendar accordingly. Unfortunately, the EI driving meetings always seem to be on Tuesday nights, which I am unable to attend due to another commitment. So your question about adding a comment or blog section to the website

could be useful for things like that. I'd also add that the website is a good one. Lots of info, and fairly easy to navigate. As far as clinics/workshops, I'd be interested in something on trailering. It's the most dangerous and scary thing that I do with my horse, and I'd love any tips on how to make it safer. Trailer safety, maintenance, emergency response, health and safety tips, things like that. Then again, maybe I'm just a chicken.

- E.I. is doing a great job. There are a few of us who live on the peninsula. Location does play into the equation when the clinics are too far North. All in all I'm happy with the work everyone puts into it. Finding location and dates that work must be a chore.
- I'm a new member (a very satisfied member).

6. Planning Offsite

The annual E.I. planning offsite was conducted over a 6 hour period with various activities to surface the most important issues of the day.

6.1 SWOT

SWOT is a brain storming activity which involves everyone and helps organize collective thought.

6.1.1 Method

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. This method calls for topics in each of the 4 areas to capture existing assets (strengths) of the organization, things we don't do well (weaknesses) (both are internally focused). Then external opportunities and threats are captured. Finally all items are grouped and voted on.

6.1.2 SWOT Results

The grouped results were voted on and here are the top three or four in each category

6.1.2.1 Strengths

- Website Content, electronic E.I.
- Shows and other events
- Organizational strength

6.1.2.2 Weaknesses

- Succession Planning
- Electronic content usability
- Financial controls
- Volunteer recruiting

6.1.2.3 Opportunities

- Better communication
- More and better education
- Better financial controls
- Better volunteer participation

6.1.2.4 Threats

- Lack of volunteers for leader roles
- Increasing cost of the sport
- Loss of space for horses
- Lack of youth base

6.1.3 Organizational Health and Membership Value

In order to deliberately focus on short term 2009 planning and longer term ideas, we brainstormed on topics impacting “Organizational Health” and “Membership Value”. We then organized them in short term and long term.

6.1.4 Raw topics organized by group and immediacy

6.1.4.1 Short Term Organizational Health

- Implement standard accounting practices for events
- Allows for better sharing of financial results (software)
- Create partnership with 4H, pony club and adult riders in other groups
- Facilitate and keep better track of for check writing
- Better cost/benefit analysis on events
- Improve accuracy and detail of financial reporting
- Complete documentation of all job descriptions
- Get more volunteers to fill shifts through software
- Develop plan to increase volunteer base
- Better use of volunteer database and communication
- Create a Q&A on the website
- Improve use of calendar and e-flash communications

6.1.4.2 Long Term Organizational Health

- Fill volunteer positions well in advance of event
- Increase volunteer participation by 10% a year
- Leverage trainers to reach out to students for volunteers
- Better communications with young riders (under 21)
- Alliance with Area VII adult riders
- Better connection with our chapters
- Better strategic alignment with other orgs doing the same thing
- Broaden alignment with youth organizations
- Identify and groom board members outside E.I.
- Implement succession planning for board positions
- Increase the number of members who are willing to become board members

6.1.4.3 Short Term Membership Value

- Create new member only services online

- Update show and clinic opportunities on website regularly
- Offer membership signup and purchase online
- Revamp website to be more accessible
- Expanded use of website and e-Flash for member communication
- Create a website (moderated) gossip column
- Create a what's new on website to aid navigation
- Make the website "the" source for events, resources (beginner rides, books), environment issues, clinics, car pooling and networking.
- Offer more cost effective service for members (clinics and shows)
- Offer more ride and review (perhaps joint discipline)
- Offer more educational seminars
- Offer more one day shows
- More consistent volunteer recognition process regards of event

6.1.4.4 Long Term Membership Value

- Better website organization
- Better communication
- Compile questions for
- Become a place for cost management (joint purchases of hay etc.)
- Be involved at state and national level in issues affecting horses and open space
- Work to support local top trainers and attract more

6.2 2009 Work Plan

The proposed work items were voted on and only the three top items were retained for the 2009 work plan.

6.2.1 Improving Fiscal and Accounting Discipline

Owner: Gunn Cooper, secondary owners include all event organizers managing a budget

Timeline: Review in Q1, and ongoing for rest of 2009

Objective(s):

1. Accuracy
2. Timeliness

Success Criteria:

1. A single method of accounting for E.I. events
2. Accurate and transparent accounting
3. Timely reporting of accounting

Milestones:

1. Review of past projects (Q1)
2. Establish common best practice (documentations)
3. Establish common tools (software)
4. Conduct training on best practices

6.2.2 Recruiting volunteer and board positions

Owner: Colleen Jones, secondary owners include all directors of the board

Timeline: ASAP for Nominating Committee and Jan 1 for posting of positions

Objective(s):

1. Constitute nominating committee for board positions
2. Implement 2 hour shifts for event volunteering
3. Expand the volunteer base

Success Criteria:

1. The establishment of a nominating committee
2. Job descriptions published and well viewed
3. Improvements in volunteer recruitment

Milestones:

1. Constitute nominating committee for board positions
2. Edit, Review, and post all board and volunteer positions online
3. Implement 2 hour shifts for event volunteering

6.2.3 Improve the use of Electronic Communications

Owner: Peter Larsen and Shelly Navarra

Timeline: Jan 1 for usability study, Q1 for 'newsletter'

Objective(s):

1. Revamp website for usability
2. Create the infrastructure for differentiated membership services
3. Create a monthly electronic newsletter

Success Criteria:

1. A user guided plan for a website overhaul
2. The implementation of the website overhaul
3. The establishment of a login based membership services infrastructure
4. The establishment of an electronic newsletter

Milestones:

1. Conduct end-user survey of website usability – perhaps focus group
2. Write plan for simplified and more usable website design
3. Implement new website design
4. Implement password based membership access to select services
5. Create template for electronic newsletter
6. Start producing electronic newsletter based on Flying Changes submissions