

*THINKING & PLANNING
STRATEGICALLY*



*United States Dressage Federation
Strategic Plan
February 2007*

This is that direction...

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A strategic planning group consisting of five Executive Board members, six dressage experts, and four senior staff members of the United States Dressage Federation (USDF) met on August 23, 2006 to develop a long-range strategic direction. Bud Crouch, principal partner of Tecker Consultants LLC, led the group through the planning process.

This planning document signals the Executive Board's desire to create and define a clear strategic direction for USDF. It is the planning group's consensus regarding what will constitute USDF's future success. It answers the following two strategic questions:

1. Where is USDF going? *USDF's future direction*
2. Why is it going there? *USDF's reason for existence and core purpose*

Planning Horizons:

During this session, the strategic planning group reviewed the four planning horizons that are used by successful organizations today, including 10 to 30-year planning vision, 5 to 10-year critical assumptions, 3 to 5-year strategic planning, and 1 to 2-year annual operational plan.

These horizons significantly differ in strategic focus and the length of planning time. Organizations that successfully employ the four planning horizons understand the difference between what should never change and what should be open to change. They are aware of the difference between what is genuinely sacred to the organization and what is not. This rare ability to manage continuity and change is facilitated by the development and use of the four planning horizons.

Strategic Focus:

Organizational strategic focus or intent is very important. One of the challenges facing USDF is the fact that there is more to be done for members and dressage than it has resources to accomplish. The temptation to do everything can often lead a not-for-profit organization to try to be "all things to all people." The result of this approach is not doing anything particularly well. If everything is important, nothing is important. Planning strategically is counter to the all-things syndrome. It is about identifying a limited number of key strategic activities that USDF must undertake to move successfully into the future. Implementing the new strategic direction will bring focus to USDF's future activities.

Strategic Approach:

USDF provides a wide portfolio of programs and services, i.e., its annual operational and business plans. The approach in defining the new strategic direction was not to identify what USDF is doing today, but to determine what is not being done today and must be done in the future to be successful. This strategic direction is not about business as usual – *it is about change!*

This approach separates the strategic direction and 5-year strategic plan from the annual operational plan. As the leadership team oversees the development of the annual operational plan, the strategic direction is a constant reminder of what must be changed to steer towards the envisioned future.

Updating the 5-Year Strategic Plan:

A strategic plan that covers the 3 to 5-year planning horizon can only stay current and relevant if the governing body ensures that the plan is updated on an annual basis. A strategic plan is not laser-beamed onto a marble tablet that can never be changed. It is the leadership team's working document. Therefore, the governing body has both the right and the responsibility to: (1) change the 3 to 5-year strategic plan when it needs to be changed based on sound reasoning and assessment and (2) update the plan on an annual basis.

Development of the Strategic Direction:

The objective of the planning group is to create a credible and relevant strategic direction in the form of a user-friendly document, to assist leadership in making sound decisions in order to sustain USDF's success.

We wish to thank USDF volunteers, leaders and staff who offered their valuable time and hard work to participate in the successful development of this strategic direction. It is the responsibility of USDF's entire leadership team to give the new direction meaning and life.

STRATEGIC ASSUMPTIONS



External Assumptions:

The following are USDF's 10-year assumptions concerning the key external trends, challenges, or issues that will affect the sport of dressage and USDF in the future. They may represent future opportunities or threats.

Financial Issues:

- Financial issues can be major challenges for many people involved with horses. The cost of owning and keeping horses is rising rapidly.
- The cost of participation and showing in dressage also continues to rise.
- Economic factors may make dressage and all equestrian sports, especially on a competitive level, less accessible to people with limited income.
- There will be increased competition for sponsors' dollars.

Characteristics of Dressage:

- The United States Equestrian Federation (USEF) is the US governing body of FEI and Olympic equestrian disciplines and is responsible for issues of rules enforcement and athlete development for international competition.
- There should be a National Championship for adults and/or adult amateurs.
- A declining trend in accessible training, boarding and show facilities is an issue.
- Current training controversies are affecting dressage, especially animal welfare concerns and the vulnerability to accusations of cruelty. Pressure will increase from animal welfare groups (via federal and state laws).
- The adoption of technological advancements and standards in competition management is a challenge.

Roles and Regulations:

- There is a lack of a clear understanding of USDF's role vs. USEF's role in serving the sport of dressage.

Image & Recognition:

- The 2010 Alltech/FEI World Equestrian Games at the Kentucky Horse Park will provide a significant opportunity to advance equestrian sports in the United States
- The general public has a lack of interest in and knowledge of dressage.

- Other disciplines are beginning to accept and value the principles of dressage.

Mega issues:

Mega issues are overriding issues of strategic importance that cut across multiple outcome areas. They concern key issues that USDF must address, illuminating choices it must make and challenges that need to be overcome to better: serve its members; fulfill its purpose, cause or mission; and successfully move into the future. The planning group developed the following mega issues.

Strategic:

- What is USDF's role or niche in the future? Why will it exist in the future? What is its mission? Who will it serve?
- How can USDF satisfy the varied needs of adult amateurs, junior/young riders, professionals, high performance riders, breeders and other dressage enthusiasts? How much emphasis and resources should be devoted to meeting the needs of each of these groups?
- How can USDF better integrate members of local dressage organizations into the national organization so that they feel supported by USDF and, in turn, support the national organization?
- What is USDF's changing role and how does it fit synergistically with USEF?

Financial:

- What does USDF need to do to generate a steady source of additional income outside of dues increases? How can USDF deal with competition from other groups or associations for dressage education dollars?
- What will USDF need to do to provide consistent support for USDF's National Education Endowment Fund so that the organization's educational programs can be expanded and improved?
- How can, or should, USDF support the fundraising efforts of The Dressage Foundation?
- How can USDF find ways to attract elite riders on their way to international success and recognition and acquire their support?

Competition:

- How can the organization improve its membership and competition data collection, reporting and standardization capabilities?
- How can USDF and USEF simplify the competition entry and reporting process?

USDF Culture:

How can USDF create a culture that is more inclusive and less exclusive? Do we need to change what we wear in competition?

- How can USDF improve its strategic relationship with USEF to benefit dressage?

Key Stakeholders and Strategic Partners:

- How can USDF improve its strategic relationship with USEF to benefit dressage?
- What does USDF need to do to sustain a successful ongoing relationship with the existing GMOs and independent clubs? Why should they affiliate with us, and how do they benefit from that relationship?

Membership Value, Relevancy and Indispensability:

- How can USDF increase its membership base and member participation?
- In what way can the organization best define, fund, communicate and nurture the diverse membership segments and members who fit and support its mission in many different ways?
- What kind of programs and services does USDF need to provide to its members, at all levels, so that they value their USDF membership?
- How can USDF become of value to people interested in dressage but who aren't currently motivated to join a GMO or become a PM?
- How can USDF improve the overall quality of dressage instructors and USDF certified instructors.
- What national programs for adults can USDF develop that are unique to USDF and do not compete with local programs (a national championship? - educational opportunities?)

Image, Reputation and Brand:

- How can USDF better position itself as the voice of US dressage?
- How can USDF be valued for its work when a significant segment of the dressage community does not recognize USDF's contributions to improve the sport?
- How can USDF increase its image at the grassroots level? What do people think of USDF, and who knows we exist?
- How can USDF get the typical dressage competitor to understand and differentiate between USDF and USEF?
- Should we consider a name change to US Dressage?

- How can USDF take advantage of its new location at the Kentucky Horse Park?

Infrastructure:

- What kind of governance structure and process will USDF need to achieve its goals and sustain its success in the future? What kind of leadership succession planning program should be developed for future Board members?
- How can USDF develop better events to showcase dressage?
- How will USDF need to grow its staff infrastructure in the future to increase its capacity to meet members' increased expectations and demands?
- How can USDF reduce the bureaucracy of councils and committees and retain the desired level of member "ownership" and input?
- What level of empowerment should reside with the staff administrative arm?

Identity of Excellence (USDF's Branding)

An identity of excellence describes the framework for USDF that will be required to sustain a position of relevance and earn a reputation for value and excellence for the future.

An organization with a true cause, or constituent focus, must start with the knowledge of what the constituents consider to be of value, and then build a comfortable relationship with them to be seen as the provider of choice. Value can be defined as the constituent's definition of quality relative to programs and service delivery – the right product, at the right price, and in the right format and delivery.

Brand is composed of two essential elements that form a value equation – the *value proposition* and the *value discipline*.

Value Proposition

(the promise that USDF makes to its cause and key stakeholders)

The programs and services that USDF will offer and the nature of the delivery experience based on relevant dimensions of value that members want.

Plus

Value Discipline

(the implementation of that promise)

USDF will be branded for having an identity and image of ***leading-edge programs and services*** supported by operational effectiveness, membership intimacy and representational effectiveness.

This brand will need to be supported by operational excellence, effective advocacy for the sport, and the ability to create strong membership loyalty.

To achieve this brand, the value equation for USDF needs to include the following:

Value Proposition:

(What we will offer)

- Provide leading-edge innovative forums for dressage education and other programs that provide positive and enjoyable member experiences.
- Understand what members will need, and don't yet know they need, to be successful in their dressage interest in the future.
- Develop the vision of what dressage in the United States and USDF will look like in the future.
- Create new applications of existing training programs.
- Deliver programs through a variety of formats (face-to-face and virtual).
- Build a reputation of providing these leading edge programs with excellence.

Value Discipline:

(What we must do)

- Develop a culture that supports inventiveness and innovation in order to provide leading-edge and innovative educational programs and dressage activities.
- Develop scanning mechanisms to know where the sport of dressage is going in the future.
- Create a program/activity development process that supports new program introduction with more thought.
- Be willing to leapfrog current programs.
- Operate with financial stability and security.
- Provide quality member service.

To successfully achieve this identity of excellence, USDF's strategic direction must support and be linked to this branding.

LONG-RANGE STRATEGIC PLANNING HORIZON



(10 TO 30-YEAR ENVISIONED FUTURE)

USDF is developing a 10 to 30-year planning horizon, which consists of a core ideology and 10 to 30-year envisioned future.

Core ideology clarifies what must be preserved in an environment of rapid and unpredictable change and consists of USDF's core values and core purpose.

The ***core purpose*** describes USDF's very reason for being or existing – why USDF will or should exist for a long, long time (10 to 30 years). What would be lost if it ceased to exist? What sense of purpose will motivate members to dedicate their creative energies to USDF and its efforts over a long period of time?

Core Purpose

The United States Dressage Federation is dedicated to education, recognition of achievement, and promotion of dressage.

Core values are a small set of timeless, guiding principles that do not require external justification. They only have intrinsic value and importance to USDF and its members. Core values are so fundamental that they seldom change – *if at all*. They define the behavior required in order for the organization to achieve its core purpose. Core values are so deep-seated and valid that USDF would preserve the core values even if it were admonished for having these values.


Core Values

- ***Excellent service to members***
- ***Quality education***
- ***Honesty, integrity and accountability***
- ***Open communication***
- ***Welfare of the horse***
- ***Harmonious relationship between horse and rider***
- ***Respect for all members***

Big Audacious Goal

The *10 to 30-year envisioned future* consists of two parts: a single, 10-plus-year, *big audacious goal (B.A.G.)* and a vivid description.

The B.A.G. is a huge challenge, and its achievement will require USDF to move outside of its comfort zone. The goal can be accomplished and has a clear finish line but will require heroic effort and luck. The goal will stimulate membership activity, commitment, and participation beyond USDF's present leadership. The B.A.G. is very clear and compelling to members and does not require explanation. It sets the direction for a succession of future 3 to 5-year strategic plans.

 ***USDF will be the MUST-JOIN organization for all dressage and related horse enthusiasts.***

A vivid description shows what the world would be like if the association should complete its Big Audacious Goal.

When USDF completes its Big Audacious Goal, access to dressage and USDF will be:

- widely known as the voice of dressage in North America with no confusion about its role and responsibilities in its relationship to other equine organizations;
- taking advantage of its location at the Kentucky Horse Park to promote dressage and USDF to the public;
- involved in a number of beneficial relationships, partnerships and coalitions that advance dressage;
- financially strong and able;
- enjoying a significantly increased membership;
- providing a number of new, consistent, quality educational programs;
- meeting the varied needs of adult amateurs, junior/young riders, professionals, breeders, officials, high performance riders, and non-riding dressage enthusiasts;
- recognized for a culture that is more inclusive and less exclusive.

3 TO 5-YEAR PLANNING HORIZON



The following is USDF's 3 to 5-year strategic plan, which consists of key, short-term infrastructure actions that are required to better link the infrastructure to the new strategic plan, 3 to 5-year goal statements, strategies, and milestones for each goal, and a 3 to 5-year envisioned future.

3 to 5-Year Envisioned Future

An envisioned future is a simple and concise ideal picture for the organization out 3 to 5 years. The process of developing an envisioned future is as important as the direction itself. The envisioned future does not supplant the 3 to 5-year strategic plan; it comes before it. The envisioned future sets the tone and direction for the strategic planning process.

By 2011, USDF will have:

- increased membership and membership retention;
- increased visibility;
- achieved a clear image and understanding of its roles and responsibilities;
- provided additional educational credit opportunities;
- increased members' return on investment (ROI) of their time and dollars in USDF in the form of high-quality programs and enjoyable experiences;
- better utilized technology to simplify competition management and procedures;
- restructured its governance infrastructure (both structure and process);
- increased the value of its annual convention;
- consistent standards;
- a world class Web site;
- significantly increased its outreach to GMOs;
- a clear understanding of its role as an affiliate of USEF.

LONG-RANGE GOALS



The following represents USDF's long-range goals that encompass its 3 to 5-year direction. These goals are outcome-oriented statements that lead USDF towards its envisioned future. These goals are not in any order of priority. All of the goals will need to be accomplished if USDF is to fully achieve its 3 to 5-year quest.

In 2011:

Goal A. *USDF will be its members' indispensable resource for education and training.*

Goal B. *USDF will be an advocate for the improvement and development of competitions and awards.*

Goal C. *USDF will be the recognized voice and information portal for dressage.*

Goal D. *USDF will be known for its state-of-the-art infrastructure that supports and sustains its success.*

Goal E. *USDF will be financially secure and able to support and implement its strategic plan.*

LONG-RANGE STRATEGIES

Strategies indicate how USDF will organize, focus and expend its resources and actions to maximize its effectiveness and efficiency in achieving these goals. The strategies must be reviewed and updated on an annual basis.

Milestones are used to determine the overall progress toward a goal. They indicate how close USDF is to achieving a goal as it executes the individual strategies for each goal. **The milestones measure goal achievement, not strategy achievement.**

Goal A: *USDF will be its members' indispensable resource for education and training.*

Strategies:

- A1. (High) Re-evaluate the USDF Instructor Certification program.
- A2. (High) List all current USDF educational programs (such as the University program, symposia, clinics, adult camps, L program) and evaluate their value.
- A3. (Medium) Research what other equine organizations are doing in regard to equestrian education, reference works and consider possibilities for reciprocity.

Milestones:

An increase in:

- members and membership retention;
- non-dues revenue;
- updated quality programs (increased ROI);
- favorable membership feedback;
- relationships and strategic partnerships with other organizations to increase member resources;
- use of information, knowledge and services offered on USDF's Web site;
- USDF members' participation and attendance in programs and services;
- the use of technology in delivering programs, services and opportunities for networking and sharing.

The evaluation and/or improvement of:

- USDF Instructor Certification program;
- world-class Web site (enhanced internal Web site section for members only);
- ongoing market research of membership;
- marketing program to better communicate the value and benefit of current USDF programs and services to members.

Goal B: *USDF will be an advocate for the improvement and development of competitions and awards.*

Strategies:

- B1. (High) Simplify the paperwork and processes that are involved with licensed competitions.
- B2. (Medium) Develop strategies to improve the image and quality of the Regional Championships.
- B3. (Low) Further develop the concept of a USDF directed National Championship for adults and/or adult amateurs. (define USEF and USDF roles)

Milestones:

An increase in:

- the efficiency of the paperwork and processes involved in competition;
- the total number of well-managed competitions;
- favorable feedback from competitions concerning USDF's support;
- the use of standardized technology to assist competition management and competitors;
- the existence of a USDF National Championship for adults and/or adult amateurs;
- spectator appeal and resulting sponsor interest.

Goal C: *USDF will be the recognized voice and information portal for dressage.*

Strategies:

- C1. (High) Partner with other media outlets to increase/expand coverage and distribution of dressage events.
- C2. (Medium) Provide a USDF presence at major breed and non-dressage events.

- C3. (High) Develop first class marketing materials for general distribution, as well as for use as press kits.
- C4. (Medium) Develop a strong working relationship with USEF high performance dressage. (Define the role, goals and purpose USDF has through this relationship)
- C5. (Low) Work on materials (resource center and historical) archives as a usable resource for research.

Milestones:

An increase in:

- favorable media attention and coverage at all levels (local to national);
- cooperative and supportive activities with USEF's high performance sector;
- favorable coverage in equine publications;
- USDF's presence at breed and non-dressage events.

The existence of:

- USDF's integrated external marketing plan that includes:
 - ⇒ identifying targeted audiences,
 - ⇒ media, public relations and community relations plans,
 - ⇒ key marketing messages and branding, and
 - ⇒ first class materials for general distribution, as well as for use as a press kit (e.g., print, DVD, and articles).

Goal D: *USDF will be known for its state-of-the-art infrastructure that supports and sustains its success.*

Strategies:

- D1. (High) Review USDF's governance structure and reshape it where appropriate.
- D2. (High) Redesign USDF's council and committee structure.
- D3. (Medium) Seek the Executive Director's assistance in staff and administration restructuring in response to the governance changes.

Milestones:

An increase in USDF's overall operational efficiency, effectiveness and nimbleness (need to identify existing issues to be overcome).

The existence of a reshaped:

- strategic governance infrastructure (structure and processes);
- staff infrastructure (structure and processes) and competence/experience level;
- council and committee infrastructure (structure and processes).

Goal E: *USDF will be financially secure and able to support and implement its strategic plan.*

Strategies:

- E1. (High) Implement a long-term plan to stabilize the dues structure based on inflation indexing.
- E2. (High) Formalize the purpose and structure of the National Education Endowment Fund.
- E3. (High) Identify ineffective programs and activities and reallocate the resources.
- E4. (High) Accelerate USDF's Debt-Free Plan.
- E5. (Medium) Increase sponsor revenue.

Milestones:

An increase in:

- overall net revenue;
- non-dues revenue;
- the diversification of non-dues revenue;
- the investment fund;
- non-member revenue;
- grants, sponsor, and foundation support;
- the endowment fund.

The existence of a:

- formal dues plan;
- completed USDF's Debt-Free Plan.