

# The Rocky Mountain Horse Association

## Five-Year Strategic Plan

2019 – 2023

As part of the Rocky Mountain Horse Association (RMHA) 2018 self-assessment, the board paused to reflect on the past, assess the present situation and plan for a bold future.

Board members identified four main areas on which to focus over the next five years: **preserving the breed, growing and retaining our membership, strengthening the organization, and ensuring financial sustainability.**

Strengthening those four areas will put the RMHA on a path to meeting their vision of the Rocky Mountain Horse (RMH) being known globally as “One Horse for All Occasions™!”



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# 1. Introduction - Mission and Core Values

As part of the Rocky Mountain Horse Association (RMHA) 2018 self-assessment, the Board paused to reflect on the past, assess the present situation, and plan for a bold future. The RMHA's mission is clearly stated in our By-Laws, and the Core Values, which guide our actions including the development of our future vision and the plan to get there, were developed during previous strategic planning efforts (2008). Routinely setting a strategy to guide the Board in our actions along the mission is key to being a successful association.

Our mission and values are stated below for reference.

Section 2 of this plan outlines the process and states our resulting 2023 Vision, the priority issues identified as necessary to achieve our vision are listed Section 3, Section 4 discusses how we are to manage and monitor the plan, and the resources needed to be successful are outlined in Section 5.

## **Mission/Purpose**

*To aid and encourage the preservation, promotion, breeding and development of the Rocky Mountain Horse.*

## **Core Values**

**ACCOUNTABILITY** – *We value accountability by practicing effective communication and providing benefits to our members. We are willing to take responsibility for our actions and we keep our commitments.*

**CAMARADERIE** – *We value camaraderie by trying to create a family atmosphere in all our activities. Our board and members will work together for the common goal.*

**DEDICATION TO THE HORSE** – *We value our dedication to the horse by our commitment to help preserve and promote the breed.*

**FAIRNESS** – *We value fairness by being respectful of each other and our opinions and by displaying good sportsmanship in all activities. We make decisions that are free from discrimination and bias and apply the rules consistently for all.*

**TRANSPARENCY** – *We value transparency by our display of honesty and integrity in our words and actions. We conduct our activities with complete openness.*

## 2. Strategic Planning Process and Future Vision

The strategic planning process was led by the RMHA and facilitated by Kathryn Matchett & Associates. The process involved numerous steps, including board and member surveys, formation of a strategic plan committee, a strengths, weaknesses, opportunities, and threats (SWOT) analysis and a 2-day retreat to review the data and assemble the plan. As stated above, the core values developed by the RMHA in 2008 were used in the discussions and development of our vision and plan. Details on the process are outlined in Appendix A. The SWOT and a summary of the results of the board and member surveys are presented in Appendices B and C, respectively. A detailed chart showing the goals, objectives, actions and success indicators are included as Appendix D.

### Our 2023 Vision

*In 2023, the Rocky Mountain Horse (RMH) is known globally as “One horse for all occasions™” and for all people due to its versatility and temperament. Steadily increasing demand for the Rocky has resulted in a change of status from “threatened” to “recovering” on The Livestock Conservancy’s “Conservation Priority List.”*

*Driving the Rocky’s increase in popularity is the professionally-run and fiscally sound Rocky Mountain Horse Association (RMHA). While the increasingly popular annual International Rocky Mountain Horse Show brings together RMH enthusiasts of all types (show and non-show), RMHA’s 2,500+ members participate with their Rockies in a wide variety of RMHA-supported activities year-around in every region of the United States and Internationally.*

## 3. Priority Issues, Goals and Objectives

To achieve our 2023 Vision, the RMHA Board and our membership identified priority issues that we need to achieve for the success of the association and, most importantly, for the horse to be successful. The four main issues identified are: **1 - Preserving the breed, 2 – Growing and retaining our membership, 3 - Strengthening the organization, and 4 – Achieving financial sustainability.**

These issues and the goals developed to ensure we achieve them are summarized below. A detailed list of these issues and goals, and the objectives and actions required to meet them, and the associated success indicators are provided in Appendix D. An operational plan to guide implementation of the strategic plan in FY 2019 will be in place by October 2018.

### Priority Issue #1: Preserving the Breed

#### Goals:

- A. To move from “threatened” to “recovering” status on the TLC’s endangered list by 2023 by **increasing the foaling rate**
- B. To **preserve the breed’s genetics**

- C. To ensure the **long-term health of the horse**

## **Priority Issue #2: Grow and Retain our Membership**

### **Goals:**

- A. To **grow membership** from 1,309 (in July 2018) to at least 2,500 in 2023
- B. To increase younger members (those under 39 years old) to 20 % by 2023 and youth members (under 20 years old) to 3% by 2023
- C. To increase **membership retention rate** by 2023 through **education and engagement**

## **Priority Issue #3: Strengthen the Organization**

### **Goals:**

- A. To improve the **effectiveness of the board and committees**
- B. To increase **trust among board members**
- C. To **increase trust between board & members**
- D. To increase **board stability/consistency**
- E. To improve **efficiency of board meetings**
- F. To **increase effectiveness of RMHA office (equipment, technology, space, etc.)**

## **Priority Issue #4: Financial Sustainability**

### **Goals:**

- A. Maintain annual **balanced budget** while **increasing annual income** through improved programs, improved membership benefits and involvement of members

## **4. Managing and Monitoring the Plan**

### **Timeline**

A 5-yr timeline for addressing priority issues is shown on Figure 1.

### **Annual Operational Plan**

An annual operational plan corresponding to the fiscal year will guide implementation of the strategic plan each of the next 5 years.

For each objective in the strategic plan, the annual operational plan will outline:

- one-year objectives;
- strategic actions;

Date of Approval by Board: August 18, 2018

- target dates;
- persons/committees responsible for leading the activities; and
- financial/cost requirements.

The Strategic Planning Committee will remain in place for the life of this plan (2023) and will work with the RMHA President and Executive Director to ensure the plan's success. An organization chart showing this committee's structure and the interaction of other committees and the board is shown on Figure 2. The Committee chair will report quarterly to the Board on progress being made on the annual operational plan. Adjustments to the plan will be made accordingly.

## **Annual Strategic Plan Review**

The strategic plan is a living document to be consulted regularly as a guide in realizing the RMHA's vision. An annual review of the strategic plan will be conducted toward the end of each fiscal year to assess progress toward the objectives and revise the plan, as needed.<sup>1</sup> The Board will then develop a new operational plan for the upcoming fiscal year.

## **5. Resource Implications**

### **Human Resources**

Accomplishing the goals and objectives outlined in this strategic plan will require the mobilization of existing members and recruitment of new members. Many of the few existing committees (e.g., membership, marketing, etc.) will have a renewed focus driven by the strategic plan objectives. In other cases, new ad-hoc committees may need to be created to accomplish the objectives (e.g., fundraising, policies and procedures, recruitment/volunteers, technology).

### **Other Resources - (financial, capital, physical space; etc.)**

Additional resources needed to accomplish the strategic plan objectives will be identified during the creation of the annual operational and the annual financial plan; through the assessment of current projects and needs (e.g., a new computer may be needed to allow for improving remote participation); and during the development of the new projects.

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<sup>1</sup> Indicators for measuring progress on each objective are included in Appendix D. For a few objectives, information collected through the 2018 electronic membership survey will serve as baseline data, and surveys will be repeated at a regular basis to measure progress over time.

## Appendix A: About the Strategic Planning Process

The strategic planning process was led by RMHA, who worked with planning consultant, Kathryn Matchett & Associates. The consultant employed a participatory planning model developed by Heifer International and used extensively around the world. Engagement of the RMHA membership and board resulted in a plan that is “owned” by the members and one that is based on a realistic assessment of the current situation and a shared vision of the future.

The four-phase process included the following activities:

### Phase 1: Defining the Situation

- a. Electronic surveys of RMHA board and membership in the fall of 2017 and summer 2018, respectively. ~90% of board members and 300 (23%) of general membership completed the survey.
- b. Strategic planning worksheets were completed by 11 board members, the Executive Director and Registrar in May 2018 and interviews of select board members were conducted.
- c. SWOT Analysis and Report of Key Findings based on surveys and interviews.
- d. Review of the summary and results of the February 23-24, 2008 RMHA Strategic Planning Retreat.
- e. RMHA board strategic planning ad-hoc committee meetings on May 3<sup>rd</sup> and May 14<sup>th</sup> to give feedback on SWOT and Key Findings, which were then revised and sent to the full board.
- f. RMHA Board discussion of SWOT and Key Findings occurred during a strategic planning retreat on June 29-July 1, 2018. Eight (47%) of the board members and the Executive Director and Registrar were present.

### Phase 2: Envisioning the Future and Planning Based on the Shared Vision

- a. During the May 14<sup>th</sup> meeting, the ad-hoc strategic planning committee also created a draft of the key elements of a future vision of the RMHA.
- b. At the June 29<sup>th</sup>-July 1, 2018 strategic planning retreat, the board members present revised and agreed upon the key elements of a shared future vision, identified priority issues, and drafted goals and objectives for each priority issue.

### Phase 3: Drafting the RMHA 2019-2023 Strategic Plan

- a. Based on the results of the above steps, a vision statement was drafted and shared with retreat participants, and the ad-hoc strategic planning committee refined the goals and objectives and created a draft strategic plan.
- b. The plan was distributed to the entire board on August 06, 2018 and a summary presented to the board members in attendance at the meeting on August 18<sup>th</sup>, 2018.

### Phase 4: Managing and Monitoring the Plan

- a. At the strategic planning retreat, indicators for measuring each objective were identified. These were further developed by the strategic planning committee; a conceptual 5-year plan was crafted, and an annual operational plan is in preparation mode. Monitoring of the strategic and operational plans was discussed.
- b. Board approval of this strategic plan at the August 18, 2018 board meeting.
- c. Development of final 2019 annual operational plan will be completed by October 2018.

## Appendix B: Strengths, Weaknesses, Opportunities and Threats (SWOT)

### Rocky Mountain Horse Association SWOT Analysis – June 2018

<p style="text-align: center;"><b>Strengths</b></p> <p style="text-align: center;"><i>What existing attributes of RMHA will help us face the next 5-10 years?</i></p> <ol style="list-style-type: none"> <li>1. Passionate, knowledgeable members</li> <li>2. Professional, effective board that works well together</li> <li>3. Committed, accessible Executive Director</li> <li>4. Valuable membership benefits</li> <li>5. Transparency (members having access to board meetings and organizational documents)</li> <li>6. Protected (and successfully defended) trademark</li> <li>7. Clear, detailed bylaws, rules, breed standards, etc.</li> <li>8. Rocky Mountain Horse Foundation</li> <li>9. Programs (youth, trail rides &amp; international show)</li> <li>10. New website and pedigree database</li> <li>11. Breed registry</li> <li>12. Preservation of the RMH Breed – no longer on endangered list</li> <li>13. Popular, marketable, versatile horse</li> </ol>	<p style="text-align: center;"><b>Weaknesses</b></p> <p style="text-align: center;"><i>What are gaps and insufficiencies in our skills, organization, financial position, technology, etc. that could dampen our success over the next 5-10 years?</i></p> <ol style="list-style-type: none"> <li>1. Lack of trust between board and membership</li> <li>2. No communications plan</li> <li>3. Poor membership retention</li> <li>4. Lack of activities outside of Kentucky</li> <li>5. Lack of financial sustainability/fundraising</li> <li>6. Board office turnover (all at once) causing disruptions</li> <li>7. Lack of board leadership development plan</li> <li>8. Few members running for board positions</li> <li>9. Perception of lack of transparency</li> <li>10. Lack of volunteers and organization of volunteers</li> <li>11. Insufficient marketing (RMH remaining a secret)</li> <li>12. A few weak committees</li> <li>13. Board meeting fatigue (meeting length; challenge of remote participation; etc.)</li> </ol>
<p style="text-align: center;"><b>(Possible) Opportunities</b></p> <p style="text-align: center;"><i>What new areas of growth, development, alliance, expansion, etc. could we take advantage of in the next 5-10 years?</i></p> <ol style="list-style-type: none"> <li>1. Better breed promotion, bringing RMH to forefront</li> <li>2. Strategic communications plan, including social media</li> <li>3. Continued protection of breed, moving off watch list</li> <li>4. Increased promotion, incl. stronger non-KY presence</li> <li>5. Improved membership retention plan, including more education on benefits, website, procedures, etc.</li> <li>6. Embracing diversity (not letting it divide us)</li> <li>7. Better utilization of regional clubs; defined liaison role</li> <li>8. Increased opportunities for diverse segments – seniors, trail riders, non-KY, lower-income, etc. <i>(Note: 90% trail ride; 23% participated in trail ride program)</i></li> <li>9. Increase % of younger members; junior “board” idea</li> <li>10. Improving board meetings through use of technology</li> <li>11. Revisiting certification/registration rules, which may lead to increased numbers certified &amp; registered.</li> <li>12. Improved financial planning</li> <li>13. Increased alliances with organizations/companies</li> <li>14. Acquisition of property (show facilities &amp; office space)</li> <li>15. Implementation of our own events</li> </ol>	<p style="text-align: center;"><b>(Possible) Threats</b></p> <p style="text-align: center;"><i>What and who could challenge us over the next decade, putting us at risk?</i></p> <ol style="list-style-type: none"> <li>1. Division within the organization (board vs. members; KY vs. non-KY; show vs. non-show; old vs. new)</li> <li>2. Lack of sufficient financial reserves</li> <li>3. Negative impact of social media due to disgruntled members, misinformation, hysteria, etc.</li> <li>4. Becoming complacent; merely maintaining status quo</li> <li>5. Lack of RMHA support within Kentucky</li> <li>6. History of staff turnover following officer turnover</li> <li>7. If the RMH breed were to begin declining in numbers (RMH still on watch list)</li> <li>8. Lack of diversity in RMHA programs</li> <li>9. Loss of trust of supporters of breed</li> <li>10. Ageing membership <i>(Note: 75% of survey respondents were over 50 years of age)</i></li> </ol>



## Appendix C: Key Findings from Surveys and Interviews

### Overview of Key Findings

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#### Current State:

Most members (70.3%) are happy with their participation in the RMHA. The RMHA is thought of as doing an excellent job in fulfilling its mission of **aiding and encouraging preservation, promotion, breeding and development of the RMH horse** especially with our research into the genetics and health issues through our partner, The Rocky Mountain Horse Foundation.

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#### Member Engagement:

Members are happy with the RMHA, but many are frustrated with the lack of programs and support beyond Kentucky and desire additional programs beyond showing. More work is needed to ensure the RMH is strongly promoted and improves its position on the **Livestock Conservancy's Endangered List**.

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#### Strengths:

The RMHA is one of the premier horse registries. Its patented **breed standards and certification process are world class** and helps to preserve the traits of this phenomenal horse. Information about our horses is easily accessed through an online pedigree database. Members are knowledgeable and passionate about the RMH and resonate with our tagline of **"One Horse for all Occasions"**.

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#### Areas for Improvement:

Members would like more **education/communication about benefits, opportunities and the website, more diverse programs, and desire a higher level of trust** between themselves and the Board. A **stronger marketing campaign** is needed to help promote the breed. To accomplish our goals and meet member expectations, increased member engagement in both fundraising and volunteering is necessary. Although leadership is strong, **representation by geography and phasing board rotation** is needed. In addition, the board needs to improve how it conducts business and hold ourselves accountable for results - **"we are not a club, we are a professional association"**.

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#### Membership Growth:

Membership growth starts with promoting the RMH. In addition, outreach to new audiences, holding family-friendly events and supporting regional clubs would enhance growth. Designing programs to **allow for additional participation is desired**. Volunteer opportunities and engaging members at their optimal level would promote membership growth and leadership development and cultivation were also recommended.

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#### Fundraising Goal for 2023:

To achieve our vision and ensure the financial success of the organization, **additional funds are necessary, and a detailed plan must be developed**. We need to think **"outside the box"** and will most likely need professional assistance.

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## Moving Forward:

Preserving the breed is of utmost concern to RMHA and our members. Developing a **high-end marketing campaign** is imperative to increase the recognition and thus demand for our horse and pave the way to meeting our 2023 Vision. **Engaging and growing a large membership** will continue to challenge the RMHA. However, **improving our Board and committee performance** and **enhancing communication and member education** should help to improve trust, engage current and new members, and create meaningful volunteer opportunities. **We must succeed for the horse.**

## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

	Goals	Objectives	Possible Strategies/ Strategic Actions	Indicators for Measuring Achievement
<b>. Preserving the Breed</b>	1A. To move from “threatened” to “recovering” status on the TLC’s endangered list by 2023 by <b>increasing the foaling and registration rate.</b>	<p>1A1. To develop and implement a <b>marketing campaign to increase demand for the Rocky Mountain Horse.</b></p> <p>(as part of overall RMHA/RMH marketing campaign)</p> <p><i>Note: We mentioned October 2018 as a target date for developing enough of a plan that we can seek funds for an outside consultant.</i></p> <p><i>We also discussed starting by getting free advice from Gene’s marketing contact; then getting 3 bids for developing the campaign.</i></p>	<p>1A1a: <b>Promote versatility</b></p> <ul style="list-style-type: none"> <li>“One Horse for all Occasions” – copyright and use tagline to market versatility of RMH</li> <li>Showcase versatility at international show</li> <li>Promote various activities members are engaged in (see membership survey)</li> </ul> <p>1A1b: <b>Promote endangered status</b></p> <ul style="list-style-type: none"> <li>Invitation to join in a global effort to save the RMH;</li> <li>Join Endangered Equine Alliance &amp; post frequently on their page <a href="http://livestockconservancy.org/index.php/what/internal/endangered-equinealliance">http://livestockconservancy.org/index.php/what/internal/endangered-equinealliance</a></li> </ul> <p>1A1c. <b>Partner with other organizations</b>, such as those sponsoring RMH awards. (NATR, AERC, We United, etc.)</p> <p>1A1d. <b>Advertise on trailers</b> of those competing in equine events</p> <p>1A1e. <b>Target specific population segments</b>, such as people with special needs/ disabilities, youth, etc.</p>	<ul style="list-style-type: none"> <li>Change in status on TLC endangered list</li> <li>Creation and implementation of comprehensive promotion plan</li> </ul>
		1A2. Develop and implement a <b>plan to increase interest in owning foals</b>	1A2a. Educate people on: <ul style="list-style-type: none"> <li>value of <b>bonding with foal</b></li> <li><b>activities for foals and owners</b></li> </ul>	Implementation of plan
		1A3. Implement a system for gathering data from stallion reports in order to <b>track increase in foaling rate.</b>	1A3a. Set up system for <b>tracking stallion reports</b>	Change in foaling rate
		1A4. <b>Increase foal and horse registrations</b> annually.	1A4a. Develop an <b>incentive program</b>	

## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

	1B. To <b>preserve the breed's genetics.</b>	1B1. Develop and implement a <b>gene preservation plan</b> based on neutral, scientific expertise.	1B1a. <b>Genetics Committee consults the Livestock Conservancy</b> for recs/technical assistance on preserving blood lines, types, diversity	Creation and implementation of plan
	1C. To ensure the <b>long-term health of the horse.</b>	1C1. To develop and implement a plan for <b>promoting breeding practices that ensure the long-term health</b> of our horse.	1C1a. Educate people upon completion of current studies 1C1b. Evaluate Grading system 1C1c. Silver gene & other possible health issues	Creation and implementation of plan

## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

<b>. Membership Growth &amp; Retention</b>	2A. To <b>grow membership</b> from 1,309 (in July 2018) to at least 2,500 in 2023.	2A1. To <b>promote RMHA</b> through marketing/brand awareness campaign. (See 1A1)		Change in membership numbers
	2B. To increase younger members (those under 39 years old) and youth members (under 20 years old) by 2023.	2B1. To include in the overall promotional strategy a plan for targeting <b>younger age groups</b> . (See 1A1)	2B1a. Determine youth membership baseline and set target for 2023.  2B1b. Reach out to <b>youth programs in other states</b> (4H, etc.)	Change in % of members under age of 39 to 20%?  Change in number of youth members to 3%?
	2C. To increase <b>membership retention rate</b> by 2023 through <b>education and engagement</b> .	2C1. To educate members by developing and implementing a comprehensive <b>membership education and communication plan</b> by January 2019.	2C1a. <b>Raise awareness of information RMHA already has available and how to access it.</b> (membership benefits, board info, registry, etc.) ( <i>Note: Gene has started a document.</i> )  2C1b. Include in the plan a <b>web and social media strategy</b> that engages members.  2C1c. A few things to educate about: <ul style="list-style-type: none"> <li>• <b>RMHA Core Values</b></li> <li>• <b>Opportunity</b> to join effort to save our beloved, endangered, horse (be part of something big)</li> <li>• <b>Value of the registry</b></li> <li>• <b>Need for space &amp; how members can help fund it.</b> (appropriate office space; an RMHA “home;” space for membership activities; show space?)</li> </ul> 2C1d. <b>Connect members with other resources &amp; networks</b>	Change in retention rate  Creation & implementation of plan

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## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

		<p>2C2. Increase participation in <b>the trail mileage program</b> (metric TBD in 2019) by 2023. (Note: 90% of survey respondents trail ride, while 23% participate in our trail mileage program.)</p>	<p>2C1a. Explore possibility of allowing <b>noncertified horses to participate</b>. Analyze value (financial &amp; otherwise) of engaging the 70% of trail riding survey respondents who are not participating in trail mileage program.</p> <p>2C1b. Explore <b>different levels of certification</b> (breeding, show, trail ride)</p> <p>2C1c. Explore how RMHA <b>can help make it easier for people to get horses certified</b> – esp. those owning one or two who are outside of KY.</p> <p>2C1d. <b>Educate those not interested in getting certified about value of doing it.</b></p> <p>2C1e. <b>Improve incentives</b> (recognition, prizes, etc.)</p>	<p>Change in number participating</p>
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p><b>2. Membership Growth and Retention continued</b></p> </div>	<p>2C3. <b>Increase participation in the versatility program</b> by 15% annually</p>	<p>2C3a. Research ways to increase participation in versatility program</p> <p>2C3b. Consider charging? (See 4A2f)</p>	<p>Change in number participating</p>	
	<p>2C4. <b>Increase participation in show programs</b> by 15% annually.</p>	<p>2C4a. <b>Engage all members in international show</b>, including those who don't show</p> <p>2C4b. Develop strategies for increasing number competing in international show</p>	<p>Change in number participating</p>	
	<p>2C5. <b>Increase participation outside of KY</b> by supporting activities in different regions</p>	<p>2C5a. Better utilize <b>liaisons</b> to support regions</p> <p>2C5b. Better support <b>regional clubs</b></p> <p>2C5c. Institute <b>regional MAL's</b> (bylaw change); develop regional map (including international) by 2019</p>	<p>Increase in activities outside of Kentucky</p> <p>Decrease in survey respondents begging for activities outside KY</p>	

## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

<b>3. Organizational Strengthening</b>	3A. To improve the <b>effectiveness of board &amp; committees</b>	3A1. Develop and implement plan for <b>increasing effectiveness of board and volunteer committees</b>	<p>3A1a. informal policy/procedure (<b>P&amp;P</b>)            “This is how we work” document</p> <ul style="list-style-type: none"> <li>• Expectations of volunteers</li> <li>• Expectations of board liaison to committee</li> <li>• New emphasis on professionalism, accountability and responsibility</li> <li>• Requirement to submit minutes when there is a motion to the board; provide simple form to make it easy (form not required)</li> </ul> <p>3A1b. Opportunity for “<b>renewal of vows</b>” by every volunteer and board member (holding selves &amp; each other accountable for good of RMHA &amp; RMH)</p> <p>3A1c. Feature a <b>Core Value</b> at start of each meeting</p>	<p>Creation and implementation of plan</p> <p>Decrease in incidences of committees not completing work in timely manner (i.e. brochure)</p>
		3A2. Develop and implement a plan for <b>identifying and recruiting and retaining committed, reliable volunteers</b>	<p>3A2a. Take into account the <b>cost of volunteering</b> (time and money)</p> <p>3A2b. Find new ways to <b>recognize volunteers</b></p> <p>3A3b. Develop a process for <b>identifying and recruiting</b> new volunteers:</p> <ul style="list-style-type: none"> <li>• Add to paper membership form – question about areas they are interested in volunteering (It is already on electronic form)</li> <li>• Establish procedure for capturing potential volunteers from membership applications; establish system for contacting, interviewing, placing in appropriate position.</li> <li>• Establish way to annually ask each member if interested in volunteering</li> </ul>	Increase in pool of committed, reliable, efficient volunteers
	3C. To <b>increase trust between board &amp; members</b>	3C1. <b>Education/ communication plan</b> (See 2C1)		Membership Survey: Change in transparency rankings and comments
	3D. To increase <b>board stability/ consistency</b>	3D1. Develop and implement <b>succession plan</b>	<p>3D1a. Bylaw change and plan for implementing change in <b>rotation of officer positions</b></p> <p>3D1b. <b>Regional MAL structure</b> (See 2C5C)</p>	New officer rotation implemented

## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

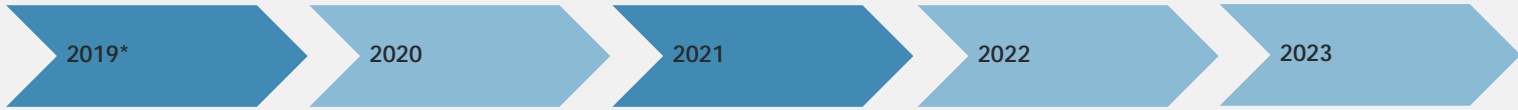
	3E. To improve <b>efficiency of board meetings</b>	3E1. Develop and implement a plan for utilizing <b>technology to improve remote participation</b>		Improvement in remote experience
	<b>Organizational Strengthening continued</b>	3E2. <b>Shorten meetings</b>	3E2a. Utilize <b>"FYI"</b> for items not requiring action  3E2b. Indicate <b>specific time for each agenda item</b>  3E2c. Utilize <b>hitching post</b> to defer issues to another time  3E2d. Hold committees accountable to <b>submitting agenda items in advance</b>	Change in length of meetings



## Appendix D. Chart of Priority Issues, Goals, Objectives, Strategies & Indicators

	3F. To <b>increase effectiveness of RMHA office</b>	3F1. Identify ways to improve office functioning and implement plan for addressing them.	3F1a. Create <b>Policies/Procedures (P&amp;P)</b> doc for office  3F1b. Assess space needs (file storage; offices; etc.)	Plan implemented
<b>4: Financial Sustainability</b>	4A. Maintain annual <b>balanced budget</b> while <b>increasing annual income</b> through improved programs, improved membership benefits and involvement of members,	4A1. To <b>reexamine financial costs</b> of certain activities/items and develop a plan for making them more profitable	4A1a. <b>International Show – Explore less expensive venue</b>  4A1b. Explore feasibility and financial benefits of changing printed mag to <b>annual yearbook-style publication</b> that pays for itself through ads (see “We Ride Sports & Trail”). Distribute in Jan. Recognitions/honors. A section for each region.	Annual balanced budget  Increased profit – International Show  Increased profit - publication
		4A2. To develop and implement a <b>fundraising plan that meets or exceeds annual targets.</b>	4A2a. Increase <b>sponsorships</b>  4A2b. <b>Cultivate donors from membership</b> (large % of survey respondents indicated high income)  4A2c. Consider <b>appendix registry</b>  4A2d. <b>Fundraising events</b>  4A2e. <b>Non-member charge for pedigree database</b>  4A2f. Charge for <b>versatility program</b>  4A2g. Charge to <b>register a prefix</b>  4A2h. <b>Alumni group of lifetime members</b> sponsor/help fundraise  4A2i. Explore <b>grant funding for endangered species etc.</b>	Annual fundraising goals are met or exceeded

# Figure 1. RMHA Priority Issues Timeline



Column	2019 Objectives	2020 Objectives	2021 Objectives	2022 Objectives	2023 Objectives
Objectives	Develop & Implement Marketing Campaign	Foal and Registration Plan	Gene Preservation Plan	Youth Targeting Plan	
	Develop system to track implied foaling rate via stallion reports		Breeding Practices Plan		
	Membership Education & Communication Plan	Plan to increase participation in Show, Trail and Versatility Programs			
	Board/Committee Professionalism Plan including Recommitment of Board	Volunteer Participation Plan			
	Succession Plan				
	Policies and Procedures				
	Address RMHA Office				
	Fundraising Plan				

	2019 Success Indicators	2020 Success Indicators	2021 Success Indicators	2022 Success Indicators	2023 Success Indicators
Success Indicators	Implementation of Marketing Campaign	Implementation of the Foaling/Registration Plan	Change in Registration and Foaling Rate	Implementation and education of Breeding Practices Plan	Change in the TLC Status for RMH
	RMHA Office is right Location and better suited for our needs	By Laws Approved and MALs by Region	Implementation of Gene Preservation Plan		
	P&Ps in place and used	Increase in member satisfaction as per survey results		Implementation and education of Breeding Practices Plan	
	Increase in membership by 20%	Increase in membership by 20%	Increase in membership by 20%	Increase in membership by 20%	Increase in membership to 2500 members strong
					Increase in Youth Participation and membership

\* Assumes the following are accomplished in 2018

- Approval of Strategic Plan
- Technology Plan
- Outline of Marketing Plan/Bid Documents/Procurement of Outside Consultant to Prepare

PRESERVING THE BREED FOCUS AREA

MEMBERSHIP GROWTH AND RETENTION FOCUS AREA

ORGANIZATIONAL STRENGTHENING FOCUS AREA

FINANCIAL STABILITY FOCUS AREA

Date of Approval by Board: August 18, 2018

**Figure 2. Organization Structure to Achieve Strategic Vision**

Chair: J. Peters  
 Advisor: G. Brock

<p><b>Priority Area 1: Preserving the Breed</b>          Champion: <i>Kelvin Robbins</i></p> <p><b>Committee/Board Involvement:</b>          Marketing, Registration Advisory, Show Judging, Genetics, Certification Review &amp; Grading Committees</p> <p>Others TBD</p>	<p><b>Priority Area 2: Membership Growth &amp; Retention</b>          Champion: <i>J. Peters</i></p> <p><b>Committee/Board Involvement:</b>          Trail, Show, ISC, Youth &amp; Membership Committees          DOE          Local Club Liaison/MALs</p> <p>Others TBD</p>	<p><b>Priority Area 3: Organizational Strengthening</b>          Champion: <i>John Stivers</i></p> <p><b>Committee/Board Involvement:</b>          Rules and Nominating Committees          President, Registrar, Regional Chairs, C. Kilburn Society</p> <p>Others TBD</p>	<p><b>Priority Area 4: Financial Sustainability</b>          Champion: <i>Ellen Knapp</i></p> <p><b>Committee/Board Involvement:</b>          Treasurer          Finance, Marketing &amp; Revenue Sources          Committees</p> <p>Others TBD</p>
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