

# Kelowna Riding Club Strategic Plan

## September 2023

### Mission Statement

Welcoming a diverse equestrian community by fostering an environment of enjoyment, development, and competition.

### Vision Statement

Education. Recreation. Inspiration.

In summer 2023, the KRC carried out an online survey of its members and non-members in the local area. The survey was designed to elicit information on the needs and wants the horse community would like to see The Club provide. Data from the survey was analyzed and information from the facilities committee was gathered to help create a 10 year strategic plan.

#### **Survey Summary. Data is shown as number of responses from 118 respondents:**

1. **Equestrian disciplines that responded to the survey;** Dressage (53), Hunter/Jumper (47), Eventing (28), Working Equitation (23), Competitive Trail Riding (22), Gymkhana (20), Working Ranch (16), Barrel Racing (16), Roping (11), Western Pleasure (10), Family of Riders (9), Driving (5), Reining (3), Cutting (2).
2. **What is most important to you? Top Responses;** Riding (79), Horse Clinics (70), Horse Shows (63), Supporting the Horse Community (57), Training (46), Spectator (7).
3. **Which activities would you like to do or see at The Club?** Clinics (97), Competitions (89), Lessons (42), Hacking without a coach (42), Social Events (35), Spectating (11), non-horse related events (5).
4. **What amenities would you like to have at The Club?** Covered Arena (76), Covered spectator area (41), Working Ranch/Trail course for training (39), day pens/holding pens (30), Flat multi use area (22), Upgrade sound system (21), Food & drink service (20), Permanent stabling rather than temporary (16), Clubhouse shower/wash upgrade (15), Clubhouse kitchen upgrade (14), Clubhouse interior upgrade (12), Covered round pen (7), High line (2).

5. **What events and services would you like to see hosted?** Clinicians of any discipline (91), English competitions (73), Western competitions (41), Pony Club (31), Social Events (28), Rider level test days (26), 4-H (18), Breed shows/showcases (15).
6. **Would you welcome non-horse related activities;** Dog events (71), non-horse related markets (61), Other livestock events (26), No non-horse related events (26).

**Data gathered from survey has created the following goals**

- Provide more clinics for all disciplines
- Provide more shows for all disciplines
- Create shade for riders, horses and spectators
- Increase the number of social gatherings
- Provide more opportunities for social rides
- Create a perimeter trail
- Create more holding areas for horses.g. day pens, portable stalls
- Update the sound system
- Improve The Clubhouse facilities
- Consider introducing non-horse events to provide revenue

**Additional:**

Provide safe environment for horses during natural disasters

**To achieve these goals we need to create the following committees:**

Governance, Finance, Advancement, Programming and Facilities.

Below is the start of a strategic plan for the Board, Strategic Planning Committee and the five committees:

## Board and Strategic Planning Committee

Role of the Board is to determine and uphold the organization's mission and vision, conduct and regularly review strategic planning, provide financial oversight, succession planning and ensure legal integrity and accountability. It is also responsible for maintaining sufficient resources to ensure The Club's success, monitoring programs and events to ensure they support the Mission and Vision and enhancing The Club's public image.

The strategic planning committee is an ad hoc committee that will dissolve once the KRC Strategic Plan is adopted by the Board. Members of the committee will work on the different committees outlined below.

Board and Strat Plan Goals (A)	Action Items	Responsibility	Measure of success	Timeline/Year		
				1	1-5	5-10
A1. Create a grounds Master Plan that reflects the needs and wants of the riding community	Carry out an assessment of the carrying capacity of The Club: <ul style="list-style-type: none"> <li>Assess the parking needs of trailers/rigs and vehicles using data from shows and events</li> <li>Assess the availability of off site parking</li> </ul>	Board and event/show organizers	Adequate parking for vehicles	1		
A2. Create a grounds Master Plan that reflects the needs and wants of the riding community	Assess the need for stalls and portable stalls for future shows and accommodate natural disaster evacuees: <ul style="list-style-type: none"> <li>Review portable stalls v day pens</li> <li>Permanent barn v portable</li> <li>Calculate the cost of portable stalls, day pens or permanent barn</li> <li>Research grants</li> </ul>	Board and Grounds Committee	Enough holding areas for horses to accommodate large shows and riders using The Club	1		
A3. Create a grounds Master Plan that reflects the needs and wants of the riding community	Explore the need for covered spectator area: <ul style="list-style-type: none"> <li>Assess potential sites for permanent, covered spectator shade</li> <li>Calculate the cost</li> </ul> Assess the feasibility of a perimeter Trail: <ul style="list-style-type: none"> <li>Calculate cost of design and building</li> <li>Calculate cost of ongoing maintenance</li> </ul>	Strategic Planning Committee and Grounds Committee	Covered area for spectators		1-5	
		Strategic Planning Committee and Grounds Committee	Construction of a Perimeter trail		1-5	

	<p>Assess the feasibility of upgrading the sound system:</p> <ul style="list-style-type: none"> <li>Research options and get quotes</li> </ul> <p>Assess the renovation needs for the clubhouse</p> <ul style="list-style-type: none"> <li>Establish what needs urgent attention and get quotes</li> <li>Create a plan for upgrading the kitchen and washrooms</li> </ul> <p>Assess the feasibility of a covered arena:</p> <ul style="list-style-type: none"> <li>Calculate building design and building costs</li> <li>Calculate ongoing maintenance and operating costs</li> <li>Liaise with VDRC to see if what they are doing and maybe partner with contractor</li> </ul>	<p>Board</p> <p>Board</p> <p>Strategic Planning Committee and Grounds Committee</p>	<p>Updated sound system</p> <p>Renovated clubhouse</p> <p>A future plan for erection of a covered arena</p>	<p>1-5</p> <p>1-5</p>	
A4.Encourage diversity within the Board and within The Club	<ul style="list-style-type: none"> <li>Actively recruit members from different disciplines, skills sets, gender and culture</li> <li>Assess accessibility needs for riders, coaches and spectators</li> <li>Reach out to other organizations to see if they might be included e.g. Therapeutic Riding Ass.</li> </ul>	Board	Diverse Board, diverse and inclusive multidisciplinary club	1-5	
A5.Develop a succession plan for the Board	<ul style="list-style-type: none"> <li>Develop a Board Handbook</li> <li>Digitize all club documentation to ensure ease of access and storage</li> <li>Plan for future leadership needs</li> <li>Continuously assess Board performance</li> <li>Identify and address gaps in board expertise</li> <li>Minimize potential disruption from unexpected departures</li> </ul>	Board	Seamless transition of Board members	1	
A6.Continue to develop relationships with other local clubs and barns	<ul style="list-style-type: none"> <li>Reach out to all barns and clubs in the area with open invitation to visit The Club</li> <li>Relay future plans for the club and ask for feedback</li> <li>Advise and keep apprised of club activities and events</li> </ul>	Board	KRC has good relations and is well respected by local clubs and barns	1-5	

	(website and monthly newsletter) <ul style="list-style-type: none"> <li>Consider partnerships with other clubs</li> </ul>					
A7. Establish and maintain relationship with Equine Ass., Alert, local government, ALR and regional district	<ul style="list-style-type: none"> <li>Connect with the organizations annually</li> </ul>	Board	Good relationships are achieved and maintained	1		
A.8 Review obtaining charitable status	<ul style="list-style-type: none"> <li>Look into ways we can obtain charitable status</li> </ul>	Board and Strategic Planning	Club obtain charitable status		1-5	
A9. Review membership fees and coaches fees	<ul style="list-style-type: none"> <li>Research competition</li> <li>Review fee structure for both members and coaches</li> </ul>	Board	Competitive membership fees	1		
A10. Establish a good communication system with members and the riding community	<ul style="list-style-type: none"> <li>Ensure a monthly newsletter is created</li> <li>Ensure website is updated</li> <li>Ensure social media platforms remain current</li> </ul>	Board BUT should be moved to advancement	Effective communication system	1		
A11. Carry out feasibility study for the club opening all year round	Analyze the cost benefit for the club: <ul style="list-style-type: none"> <li>Cost of insurance</li> <li>Cost of heating clubhouse</li> <li>Cost of plowing the roads</li> <li>Cost of maintenance</li> <li>Winter income from events</li> <li>Annual membership fee increased for all year riders</li> </ul>	Board	Decision is made on whether it is financially beneficial for the club to open all year		1-5	
A12. Create an evacuation plan off and into the KRC	<ul style="list-style-type: none"> <li>Review insurance</li> <li>Partnership with other agencies (Alert)</li> <li>Partnership with neighbors</li> <li>Review lighting at the club</li> </ul>	Board	Established evacuation plan	1		
A13. Review rental contract	<ul style="list-style-type: none"> <li>Liaise with VDRC pricing</li> <li>Review cost of maintaining the rings e.g. footing, harrowing and watering</li> <li>Review cost of stall rental</li> </ul>	Board and Finance	Competitive but profitable rental fees	1		

## Governance Committee

This committee shall support The Club and its BOD by overseeing and supporting the governance framework of The Club, such as policies, procedures and ensuring The Club meets with compliance and regulatory requirements while ensuring The Club's Mission and Vision is safeguarded. This committee shall review the Constitution and Bylaws of the Club annually and suggest such additions or alterations as may from time to time be deemed appropriate or necessary.

Governance Goals (B)	Action Items	Responsibility	Measure of Success	Timeline/year		
				1	1-5	5-10
B1.Review and amend Bylaws	<ul style="list-style-type: none"> <li>• Create procedure to allow input from members</li> <li>• Present changes to Bylaws at AGM for vote</li> </ul>	Governance	Updated bylaws		1-5	
B2.Create standard operating procedures	<ul style="list-style-type: none"> <li>• Create procedures for shows and events</li> <li>• Establish quoting system for work projects</li> </ul>	Governance	Club standard operating procedures		1-5	
B3.Review members' manual annually	<ul style="list-style-type: none"> <li>• Ensure manual's policies and procedures meet with industry best practice and meets the needs of our insurance policy</li> </ul>	Governance	Best practise rider's manual	1		

## Finance and Membership

Role to support the KRC and its Board of Directors (BOD) to provide financial oversight , internal financial reports, annual budgeting, financial planning, creation of internal controls, apply for grants, understand and meet external reporting requirements for a non-profit ensuring The Club’s Mission and Vision is safeguarded. Responsibility for membership also comes under this committee. With support from the Advancement Committee, they shall consider ways and means of making membership in The Club increasingly beneficial and desirable. They shall also consider ways and means of encouraging those individuals who are not presently members, but who have good potential which could be of benefit to The Club, to seek membership. They shall also consider ways and means of fostering increasing co-operation and fellowship among existing membership.

Finance Committee Goals (C)	Action Items	Responsibility	Measure of Success	Timeline/year		
				1	1-5	5-10
C1.Explore opportunities for The Club to rent to non-horse activities	<ul style="list-style-type: none"> <li>Determine the events that are permitted by our insurance, city bylaws and ALR rules</li> <li>Reach out to potential renters and assess feasibility and availability within The Club’s calendar</li> </ul>	Finance Committee, Fundraising and Grounds Committee	If feasible, a plan is generated to introduce revenue generating non-horse events at The Club		1-5	
C2.Develop grant application process	<ul style="list-style-type: none"> <li>Identify grant opportunities</li> <li>Create a calendar of grant applications due dates</li> <li>Submit grant applications</li> </ul>	Finance Committee	Established grant application process	1		
C3. Creation of an annual budget	<ul style="list-style-type: none"> <li>Develop an annual budget to present to the Board</li> </ul>	Finance Committee	Annual Budgets	1		
C4.Research membership costs and volunteer hour costs	<ul style="list-style-type: none"> <li>Compare with VDRC</li> </ul>	Finance Committee		1		
C5.Increase understanding of membership profile to assist committees, programming and volunteerism	<ul style="list-style-type: none"> <li>Review membership onboarding and information system</li> <li>Gain and record detailed information about member skills and abilities</li> <li>Recruit members with the skill sets to committees</li> <li>Improve membership application to include job descriptions for volunteer committee positions</li> </ul>	Board, Membership	Increased volunteerism, members joining committees	1		

C6.Research paid positions for key appointments.	Potential payment for: <ul style="list-style-type: none"> <li>Event planning</li> <li>Show organizer</li> </ul>	Board and Finance	Paid positions for key roles	1		
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## Advancement And Fundraising

**Role to support the KRC and its Board of Directors (BOD), responsible for strategic and policy matters related to fundraising, sponsorship, engagement, sponsor relations and stewardship that reflect The Club’s Vision and Mission.**

Advancement Goals (D)	Action Items	Responsibility	Measure of Success	Timeline/year		
				1	1-5	5-10
D1.Using data from the MasterPlan and budget create a strategic fundraising plan	<ul style="list-style-type: none"> <li>Develop list of projects that need funding</li> <li>Liaise with Board to track estimated costs</li> <li>Create a timeline for funding needs</li> <li>Identify fundraising opportunities <a href="#">see link</a></li> <li>Create a donor plan “ask package”</li> </ul> <p>Potential projects: Develop capital campaign with timeline to generate income for:</p> <ul style="list-style-type: none"> <li>Additional portable stalls/day pens</li> <li>Covered spectator area</li> <li>Perimeter trail</li> <li>Covered arena</li> </ul> <p>Develop a naming strategy for the 4 rings/clubhouse/ barn to generate income for future projects.</p> <ul style="list-style-type: none"> <li>Create video content</li> <li>Explore local college programs</li> </ul>	Advancement, Finance and Programming	Strategic Fundraising plan is available to the Board and members which is regularly reviewed.		1-5	
D2.Using data from the MasterPlan and budget create a strategic sponsorship plan	<ul style="list-style-type: none"> <li>Contact all existing sponsorships, thank them for last year.</li> <li>Provide them with a list of next year's opportunities and ways in which The Club will be promoting its sponsors.</li> <li>Create a list of potential sponsors, contact them with suggestions for next year’s events and what The Club can</li> </ul>	Advancement	Strategic sponsorship plan is available to the Board and members which is regularly reviewed	1		



	<ul style="list-style-type: none"> <li>do for them</li> <li>Firm up commitments. Update website with committed sponsors. Advertise events with sponsors recognised</li> <li>Organize annual sponsorship appreciation dinner.</li> </ul>				
D3.Increase social aspect of The Club	<p>Plan to organize social events for next year e.g.</p> <ul style="list-style-type: none"> <li>Coffee and ride</li> <li>Communication system to connect riders</li> <li>Fun Night</li> <li>Speaker series</li> <li>Season fun ride; Easter parade, Summer water fun, Halloween Parade</li> <li>Season opener multi discipline education day</li> <li>Tack Sale</li> <li>Wine and cheese with the Board</li> <li>See "Educational Program" for other ideas</li> </ul>	Advancement and Programming	Increased number of social events at The Club	1	
D4.Increase social media presence within the Okanagan	<p>Increase social media:</p> <ul style="list-style-type: none"> <li>Instagram</li> <li>Facebook</li> </ul>	Advancement	Excellent social media presence	1	
D5.Create a brand kit for the KRC	<ul style="list-style-type: none"> <li>Research a design software company e.g. Canvas</li> <li>Implement the brand kit</li> </ul>	Advancement	KRC brand kit	1	
D6.Create strategy to retain and increase club membership	<p>Organize events to increase understanding of the KRC:</p> <ul style="list-style-type: none"> <li>Introduction day town hall, celebration of all disciplines (April)</li> <li>Club opening "Meet the Board" cheese and wine (March??)</li> <li>Connect with leaders of the various disciplines</li> <li>Coffee and ride (june/July)</li> <li>Fun Nights</li> </ul>	Board, membership and Programming	Increase in Membership and increased retention	1	

## Programming and Volunteer Coordination

Role to support the KRC and its Board of Directors (BOD) to develop and implement multidisciplinary clinics, shows and educational events that reflect The Club’s Vision and Mission. Volunteerism is part of this committee. Role is to welcome and organize volunteers, maintain an online volunteer platform and promote volunteerism at The Club.

Programming Committee Goals (E)	Action Items	Responsibility	Measure of Success	Timeline/year		
				1	1-5	5-10
E1.Develop an annual calendar that reflects the multidisciplinary club	<ul style="list-style-type: none"> <li>Reach out to previous years’ participants for feedback and future bookings</li> <li>Reach out to potential new disciplines e.g archery, polo</li> <li>Liaise with education program</li> </ul>	Programming Committee	Calendar that reflects a multidisciplinary club		1-5	
E2.Develop an “Education Program” e.g. clinics, coaching courses/certificates that reflects the needs of our community	<ul style="list-style-type: none"> <li>Create a survey in January for clinic needs and develop a clinic program. Engage coaches in the process</li> <li>Develop a Speaker Series</li> <li>EC rider level program</li> <li>Create area on the website for rider levels</li> </ul>	Programming Committee	Inspiring Education Program		1-5	
E3.Increase volunteerism at The Club	<ul style="list-style-type: none"> <li>Continue to promote online volunteer platform</li> <li>Track skills and abilities on membership form</li> <li>Develop volunteer recognition program and incentives</li> <li>Highlight volunteers in monthly newsletter</li> </ul>	Programming Committee	Increased participation in The Clubs volunteer program beyond expected hours	1		

# Facilities

Role to support the KRC and its Board of Directors (BOD) to ensure the KRC grounds are well maintained and fit for purpose reflecting The Club's Vision and Mission.

Facilities Committee Goals (F)	Action Items	Responsibility	Measure of Success	Timeline/year		
				1	1-5	5-10
F1.Using the MasterPlan create a plan for the routine upgrading of the equipment	Develop and implement a schedule for the following maintenance, upgrades and replacement of:: <ul style="list-style-type: none"> <li>• Fencing</li> <li>• Jumping equipment</li> <li>• Dressage equipment</li> <li>• Judges Booths</li> <li>• Jump barn</li> <li>• Concrete blocks to house the savings and manure pile</li> <li>• Obtain 3 quotes for replacements and improvements and submit to the Board</li> </ul>	Facilities Committee	Equipment is well maintained and upgraded when required		1-5	
F2.Ensure the Board and Committees understand the maintenance responsibilities of The Club	Develop a grounds maintenance procedure manual includes: <ul style="list-style-type: none"> <li>• Irrigation maintenance and ground site plan (add to MasterPlan)</li> <li>• Sewage maintenance and ground site plan (add to MasterPlan)</li> <li>• Footing maintenance plan</li> <li>• Obtain quotes for improvements and submit to the Board</li> <li>• Work with caretaker to ensure maintenance is carried out in a timely manner</li> </ul>	Facilities Committee	Grounds are well maintained and upgraded when required	1		
F.3Create a landscaping plan	<ul style="list-style-type: none"> <li>• Continue to work on landscaping at the club</li> <li>• Ensure plan helps to increase shade at the club while being mindful of irrigation requirements</li> </ul>	Facilities Committee	Landscaped club		1-5	
F4.Create a plan to engage volunteers in groundwork maintenance	<ul style="list-style-type: none"> <li>• Coordinate with volunteer organizer</li> <li>• Seek external organizations</li> </ul>	Facilities Committee	Increased support for groundworks maintenance		1-5	

	that may like to help e.g. Men's Shed and retirement communities					
F5.Research possibility of changing to city sewer hook up	<ul style="list-style-type: none"><li>• Research possibility and cost with the city</li></ul>			1		