

# United States Trager Association

## Strategic Plan

2011-2014

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November 1, 2011

### USTA President's Welcome letter

I am very excited to be representing you this year as your USTA President. You are wonderful people doing a very valuable work and we are all learning together. I couldn't ask for more.

Many hours of intensive work have been devoted, by the USTA Board, staff and volunteers, to this plan and process. We have looked closely at our strengths and vulnerabilities and have gained much knowledge and experience.

The USTA Board of Directors (BOD) recently completed its annual face to face meeting and education at the USTA office in Burton, Ohio. We spent three days learning and preparing a Strategic Plan for the United States Trager Association (USTA). After we pondered, extensively, your proxy feedback issues and the organizational strengths and weaknesses, these are the four top concerns we identified to work on over the next three years. They are not necessarily listed in order of importance.

- 1. Professional Relationships: The USTA has an ongoing process for improving the quality and content of communications, support for its stakeholders, and identifying opportunities for collaboration within its professional networks.*
- 2. Public Awareness: The Trager® Approach is recognized as a leader in the field of movement education.*
- 3. Volunteers and Staff: Invest in our capacity to support programs and services, especially in terms of staffing and infrastructure. We will identify ways to encourage and recognize the many volunteer hours.*
- 4. Fiscal Responsibility: The USTA has ongoing financial stability and a fiscally responsible Board of Directors and Staff. Members are willing to pay dues to support the organization and understand how their dues contribute to organizational success.*

The board of directors will review (annually/monthly) and update the plan as needed. We believe this plan is firmly rooted in our values. We, as your representatives on the Board, invite your suggestions and assistance as we develop activities to meet these goals.

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I would like to invite any, who wish, to join me with my personal challenge:

Do more than belong: participate.

Do more than care: help

Do more than believe: practice

Do more than be fair: be kind

Do more than forgive: forget

Do more than dream: work           By William Arthur Ward

Sharon K. Johnson, USTA Board President 2011-2012

The Board of Directors of the USTA unanimously accepted this strategic plan for 2011-2014 on January 27, 2012.

## INTRODUCTION

The Board of Directors and Administrative Staff of the USTA developed this strategic plan with assistance from Dianne Khebreh, a member of the USTA Finance Committee and past USTA Board member. Dianne's interest in strategic planning and business planning began when she co-owned and managed a PT practice and Pilates studio for 6 years. As a member of the finance committee of the USTA, she became interested in assisting the USTA with Strategic Planning.

Using "Strategic Planning for Nonprofit Organizations" by Michael Allison and Jude Kaye as a guide, Dianne assembled educational reading materials to introduce the members of the BOD and staff to the strategic planning process. Dianne and Anna Marie Bowers began meeting monthly in February 2011 to begin preparing for the planning process. These meetings and gathering input from the BOD and the membership set the stage for a work session of the full board, a few past board members, and staff at the Annual Board of Directors Retreat in Burton, Ohio during which the organization's strategic direction was defined. Input from the BOD and administrative staff was gathered over the course of 5 months prior to the 3 day meeting in July 2011. In addition, proxy feedback from the membership was reviewed and used to assess both the challenges and opportunities the USTA is likely to face over the next three years and to set the context for the choices reflected in this strategic plan. The staff helped coordinate the planning process and provided important support and analysis to complete this plan.

Nonprofits write strategic plans for a number of reasons. The USTA BOD undertook this planning process in 2011 as a management tool to help the USTA be intentional about the direction of the organization by setting goals and achieving goals to better serve its members.

Strategic planning is a systematic approach to examine past experiences and to test old assumptions and practices. The process includes gathering new information to incorporate into current practices. The planning process helps the USTA to anticipate circumstances that we may be facing in the future. A good strategic plan will allow the USTA to make informed choices about how to respond to changes before a crisis occurs. The process helps us to continually examine how we do what we do, how we spend our money, and examines if the ways we allocate our resources are congruent with the USTA Mission.

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Because Strategic planning helps to establish common goals for the organization, it promotes consensus and insures that the members of the board, the administrative staff, the educational staff, and the general membership are working towards the same goals.

It is sincerely hoped that this strategic plan will generate:

- A better understanding of the USTA mission and values amongst board members, staff, and the general membership
- Improved communication between board members, staff, and the membership
- A blueprint for actions based on current information
- Established milestones to measure and assess results
- Information that can be used to market the organization to the public and potential funders
- Meaningful change by stimulating strategic thinking and focusing on what's really important to the USTA's success.

## **EXECUTIVE SUMMARY**

### **Background and History**

#### **History of USTA**

The United States Trager Association Committee (USTAC) was formed as a committee of the Trager Institute in 2000. The purpose of the committee was to develop a proposed structure for the United States Trager Association (USTA) in response to the Trager Institute's formal recognition of other *Trager* National Associations (NAs) being formed throughout the world. The USTAC was a committee of the Board of Directors of the Trager Institute. The members of the committee were: Decia Rowland, Anna Marie Bowers, Jack Blackburn, Gary Brownlee, Kathryn Hansman-Spice, Jeffrey Joel, Judy Rose Seibert and Byron Spice.

The existing twelve geographic Regions within the United States were maintained and a communication network was established whereby at least one person in each region agreed to be Regional Communications Contacts so that information could be distributed to every member in a timely fashion. The twelve Regions and the communications contacts were:

1. Northwest – Jack Blackburn
2. Northern California – Sue Unger
3. Southern California/Hawaii/Nevada – Carolyn Mason & Margee Faunce

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4. Four Corners – Kate Rose & Sharon Johnson
5. North Central Heartland – no members, no rep
6. Central Heartland – Mike Elliff
7. South Central Heartland – Beverly Swope
8. Great Lakes – Anna Marie Bowers, Eileen Dickinson, Peggy Clancy, Nancy Giles, Patricia Waters
9. Mid-Atlantic – Dodie Becker, Kate Juliano, Janet Steele, Eula Marie Dyson, Panna Flower
10. Southeast – Joe Griffin, Betsy Oldenburg
11. Chesapeake – Betsey Weick & Judy Rose Seibert
12. Northeast – Marlena O’Hagan Buzzell

The governing body of the USTA would be a Board of Directors comprised of elected representatives from each Region, serving 3 year terms, rotating a third of the initial Board members each year (i.e. some regions initially had 1 or 2 year terms). From this governing body, one person would be selected to represent the USTA on the Trager International Board of Directors.

Bylaws were drafted and circulated to all members, and a vote of the members adopted the initial USTA bylaws and the name of the organization.

An administrative office was established in Beachwood, Ohio and staffed by volunteers. The volunteers were: Anna Marie Bowers, Judy Fasone, Laura Marks and Ann Windau.

USTA was incorporated as a 501-c-6, non-profit, membership association on January 11, 2001 in the state of Ohio. The first annual membership meeting was held September 5-6, 2000 in Seattle, Washington, and the first Board of Directors was approved. The members of the first Board of Directors were:

Northwest Region-Lynn Chadsey (AKA Sarah Lynn Joy)  
Heartland Region- Mary Openlander  
Northeast Region-Sally Frohring (Deceased)  
Great Lakes Region-Judy Fasone  
Four Corners Region-Kate Rose  
Southeast Region-Byron Spice  
Northern California-Henry Bornstein  
Southern California -Dianne Khebreh  
Mid-Atlantic Region-James Day (Deceased)  
Chesapeake Region-Judy Rose Seibert  
Member at large-Barb Allin

The Board of Directors meets by telephone conference call once a month and in person annually.

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The USTA provides educational and membership support to approximately 600 members in the United States, Australia, Costa Rica, Japan, Namibia, New Zealand, and Puerto Rico.

The USTA has an annual operating budget of between \$90,000 - \$100,000, and continues to be fiscally sound in 2011.

## **USTA MISSION STATEMENT**

The USTA expands the use and recognition of the Trager® Approach and Mentastics® Movement Education by supporting the development, education, and practice of its members. To achieve our mission, USTA members:

- A. Protect the integrity of the *Trager* Approach by maintaining, supporting and enforcing the professional standards of practice and instruction;
- B. Coordinate and regulate teaching of the *Trager* Approach and *Mentastics* movement education;
- C. Embrace continuing professional development and personal growth;
- D. Support the growth and evolution of our community;
- E. Promote research of the *Trager* Approach and *Mentastics* Movement Education;
- F. Maintain communication between members with other organizations that value the principles of the *Trager* Approach and *Mentastics* Movement Education; and
- G. Perform prudent and necessary business and legal functions to maintain organizational viability for execution of our purposes.

## **USTA VALUES STATEMENT**

The following core operating values influence the culture and public image of the United States Trager Association as we serve our membership and expand the use and recognition of the *Trager* Approach.

### **Presence**

Being *present* fosters authentic relationships, creates ease in communication and benefits self awareness. *Presence* allows the USTA as an organization to be intuitive, creative, receptive, alive, vibrant, and peaceful but not passive.

## **Curiosity**

*Curiosity* allows the mind to stay in the present moment and fosters the potential for change. Because the USTA values *curiosity*, we promote research to better understand the benefits and effects of the *Trager* Approach and we embrace the continuing personal and professional development of our members. Within our organization and with the public, *curiosity* empowers collaborative relationships by first seeking to understand then to be understood.

## **Inclusivity**

*Inclusivity* allows the USTA to be open to what is possible, by honoring what is, meeting each other where we are, and accepting diversity.

## **Ease**

The USTA strives to achieve a balance between *ease* and effort that creates simplicity in our organizational structure and fosters collaboration within our organization at the national and international levels. *Ease* is the right amount of effort and structure. Striving for a balance between *ease* and effort allows us to be responsive to the needs of our members and assists us in achieving and sustaining our mission of expanding the use and recognition of the *Trager* Approach.

## **Gratitude/Gratefulness**

The USTA honors the legacy of our founders by being *grateful* for the work that has been passed on to us and values our past, present, and future members and all the gifts that they share.

# **DIRECTION AND RESULTS**

The strategic direction and goals included in this plan are the USTA's response to its understanding of what its members value most about the organization and the current opportunities and challenges for offering support and services to our membership, and for promoting the use and recognition of the *Trager* Approach and *Mentastics* Movement Education.

The following strategic plan will be reviewed and monitored for progress and results quarterly by the BOD and the plan will be revised annually.

## **USTA Strategic Plan - Core Strategies**

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The following 4 overarching strategies will inform the USTA's goals for the next 3 years:

- 1. Professional Relationships: The USTA seizes opportunities to collaborate within its professional networks and has an ongoing process to improve the quality, content, format, and timeliness of communications.** To be in alignment with our mission objectives, to maintain communication between our members and to support the growth and evolution of our community, the USTA is committed to improving the quality of communications to all stakeholders. We believe that focusing on the quality and content of our communications, the USTA members will be better informed and more satisfied, and this will enhance understanding and collaboration among the members at all levels of the *Trager* organization.
- 2. Public Awareness: The TRAGER Approach is recognized as a leader in the field of movement education.** In alignment with our mission objective to expand the use and recognition of the *Trager* Approach and Mentastics® Movement Education, the USTA will focus on identifying and implementing ways to increase public awareness, which will result in increased numbers of clients for practitioners and increased numbers of students entering and completing the certification program.
- 3. Volunteers and Staff: The USTA invests in our capacity to support programs and services, especially in terms of staffing and infrastructure. The staff is supported by a vibrant volunteer force.** Our staff and our volunteers are our greatest resource. As a membership organization, the organization supports its programs and services primarily with income provided by the annual dues of the members and the many hours of service provided by our volunteers. We want to direct our financial and personnel resources to providing the services that are most important to the satisfaction of our members. We will identify ways to use technology to enhance member services and identify ways to encourage and recognize the many hours of volunteer time given to the organization. Investment in our capacity to support programs and services will result in increased member satisfaction, increased member retention and increased involvement/numbers of volunteers at the regional and national levels.
- 4. Fiscal Responsibility: The USTA has ongoing financial stability and a fiscally responsible Board of Directors and Staff. Members are willing to pay dues to support the organization and understand how their dues contribute to organizational success.** Educating members on the USTA's finances increases the members' understanding of the operating budget of the organization. It also contributes to the financial transparency of the USTA and helps members understand how their dues provide the primary financial support for member programs and services. Members will see the value in maintaining their membership status and contributing their time and resources to the organization.

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*In order to measure our progress in achieving the following goals and objectives, the USTA Board of Directors and Administrative Staff will be asking for feedback from our members on annual basis. Every effort will be made to keep our survey questions clear and concise. It is our hope that combining all questions into one comprehensive annual survey will support your participation. We value your input.*

## **GOALS AND OBJECTIVES**

### **MISSION RELATED GOALS**

#### **Goals for membership retention and satisfaction with services and programs.**

These goals will help us achieve our strategies for professional relationships, the development of volunteers and staff, and member satisfaction with programs and services.

#### **OBJECTIVE A:** Identify and implement ways to improve communications.

**ACTIVITY 1:** To gather data about the membership's perception of the quality of communications and satisfaction with USTA services, we will create a membership satisfaction survey that gathers baseline information from members about the quality of communication from the administrative office, the USTA Board of directors (BOD), and between different groups within the USTA. The membership survey will be repeated annually. August 2012

**ACTIVITY 2:** In order to offer opportunities for networking between members, we will create a membership survey to collect professional interests and professional skills information. August 2012.

**ACTIVITY 3:** In order to identify ways that communications can be improved, the Office Oversight Committee (OOC) will review past communications that resulted in member complaints. The OOC will also begin reviewing official written communications to and from the office staff, the Board of Directors, committees, and other groups within the USTA to assess for possible language changes that better reflect our core values and more fully engage the receiver. August 2012.

Ongoing improvements will be made to official written communications from the office and the BOD based on results of members survey and review of documents. The Office Oversight Committee will continue the review of content and language contained in official written communications and documents. Official written communication between committees and other groups will be reviewed to continue to identify areas needing improvement. August 2013.

**OBJECTIVE B:** Identify which programs and services need the focus of the USTA's resources of time and money.

**ACTIVITY 1:** In order to prioritize the focus of the USTA's resources, a membership survey will be created that identifies member's priorities for programs and services from the USTA. August 2012.

The results of the membership survey will be utilized to inform the BOD decisions in regards to budgeting of resources to support programs and services. August 2013-October 2013.

Changes to the allocation of resources for membership programs and services will be implemented in the 2014 budget and in future annual budgets.

**OBJECTIVE C:** Increase member's awareness of programs and services provided by the USTA so that members get the most out of their membership.

**ACTIVITY 1:** The administrative staff will re-word the membership renewal and confirmation letters to be informative about membership services. November 2011

**ACTIVITY 2:** An informative "Membership Services Corner" will be created in the USTA newsletter. August 2012

**ACTIVITY 3:** An informative "Financial Corner" will be created in the USTA newsletter. August 2012

**OBJECTIVE D:** Develop measurement goals for monitoring success in the areas of membership satisfaction and member retention.

**ACTIVITY 1:** Review membership satisfaction survey results annually beginning August 2013.

ACTIVITY 2: Set improvement goals for membership satisfaction and retention to be achieved annually beginning August 2013.

ACTIVITY 3: Maintain database of membership satisfaction and retention trends and review annually beginning August 2013.

### **Goals for Public Relations and Increased Awareness of the Trager® Approach**

These goals will help us achieve our strategy for expanding the use and recognition of the *Trager* Approach and *Mentastics*® Movement Education.

**OBJECTIVE A:** Identify ways to increase the public awareness of the *Trager* Approach and *Mentastics* Movement Education.

ACTIVITY 1: In order to improve public awareness, we will review what has been done in the past to promote the *Trager* Approach. The documents reviewed would include, but not be limited to, the Annual USTA Education Reports and the Level One Surveys. We will identify how effective these activities have been and which activities can be modified and/or expanded upon. This review will involve all members. August 2012

ACTIVITY 2: In order to improve public awareness, the USTA will develop ways to collaborate with the Foundation for *Trager* Education Research. August 2013

ACTIVITY 3: We will implement public awareness projects that are within our budgetary constraints and/or identify fundraising options. Beginning August 2013 and annually, thereafter.

**OBJECTIVE B:** There will be a large public demand for *Trager* Sessions.

ACTIVITY 1: To gather data about the numbers of clients served by our practitioners monthly, we will create an annual survey. August 2012

ACTIVITY 2: We will review practitioner survey results and set improvement goals for number of clients served per month. August 2014

**OBJECTIVE C:** There will be an increasing number of students enrolling in the training program each year.

ACTIVITY 1: We will review the data from the annual USTA education report. August 2012

ACTIVITY 2: To gather data about attracting new students, we will include relevant questions in the annual membership survey. August 2012

ACTIVITY 3: We will review the data from the membership surveys and annual proxy feedback. August 2012

ACTIVITY 4: We will set improvement goals for number of new students enrolling in the training program. August 2013

ACTIVITY 5: We will investigate the feasibility of creating a quarterly opt-in e-newsletter which conveys information about *Trager* trainings for non-members. July 2012.

## **ADMINISTRATIVE AND GOVERNANCE RELATED GOALS**

### **Goals for expanding our administrative and governance capacity to support programs and services**

These goals will fully support all of our strategies, expanding our capacity to fulfill our mission.

**OBJECTIVE A:** The administrative staff and Board of Directors will assess and develop ways to improve the use of technology to support the administrative and governance infrastructure of the organization.

ACTIVITY 1: We will improve the members only section of the USTA website to provide access to information about services and programs. An informative “Services Corner” and an informative “Financial Corner” will be created on the USTA website. August 2012

ACTIVITY 2: We will develop a “Comment Section” in the members only section of the website to increase Board of Directors awareness of member concerns. August 2012

ACTIVITY 3: We will improve the current email communications structure so that the language used in email communications reflects our Core Values and will fully engage the receiver. August 2012

ACTIVITY 4: We will take an active role to modify and expand our Facebook event announcements to maximize impact. August 2012

ACTIVITY 5: We will educate our members about the beneficial uses of social networking to increase the public awareness of The Trager® Approach. August 2013

ACTIVITY 6: In order to identify ways that communications can be improved, we will explore the use of other technology to communicate information about programs and services. This will include, but not be limited to the use of webinars, YouTube, survey monkeys and podcasts, etc. August 2013

**OBJECTIVE B:** Increase opportunities for offering continuing education credits

ACTIVITY 1: We will offer opportunities for obtaining Continuing Education (CE) hours through volunteer service within the *Trager* organization. We will identify criteria for volunteer service hours to qualify and begin offering these opportunities by August 2012

ACTIVITY 2: We will re-evaluate and reassess the efficacy of the criteria for volunteer service and assess member satisfaction. August 2013 and ongoing.

## **FINANCIAL RELATED GOALS**

### **Goals for USTA Financial Stability and Fiscal Responsibility**

These goals will help us achieve our strategy for maintaining financial stability as a fiscally responsible organization.

**OBJECTIVE A:** Increase members' understanding of USTA income and expenses and how their dues relate to organizational success.

ACTIVITY 1: In order to increase the members' awareness of the USTA finances, we will provide the members with information on the sources of the USTA financial assets, the sources of Trager International (TI) financial assets, and how they relate to each other. August 2012 and ongoing

ACTIVITY 2: In order to increase the members' awareness of the USTA finances, we will provide the members with information about the income and expenses of the annual USTA budget. August 2012 and ongoing

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ACTIVITY 3: We will explore the development of ways to assess improvements in the understanding of USTA finances, such as inviting the membership to participate in an activity before and after the 2013 annual conference to assess our effectiveness in increasing the members' awareness of USTA finances.

**OBJECTIVE B:** The USTA will establish sufficient and stable funding to maintain services, achieve goals for expansion of services and the promotion of The Trager® Approach, and provide the staff with adequate compensation.

ACTIVITY 1: The finance committee will analyze and forecast the financial implications of new or expanded services and staff promotions to provide the Board of Directors with information needed to proceed in a fiscally responsible manner. Expenses for each proposal for modification of services, promotional projects, and changes in staffing hours will be examined to see if they are financially feasible within our existing budget or if additional fundraising will be needed.

ACTIVITY 2: The Board of Directors will explore ways to increase the scope and diversity of our income sources including fundraising for special projects to meet organizational goals.

**OBJECTIVE C:** With a better awareness of the value of maintaining their membership status and contributing their time and resources to the USTA, there will be an increase in member retention and participation in the organization.

ACTIVITY 1: Data from membership renewals, volunteer participation, and member donations will be collected to examine past trends for member retention, volunteer participation and donations in order to establish a baseline. August 2012

ACTIVITY 2: Data will be reviewed annually for changes in membership retention and participation. August 2013

ACTIVITY 3: After reviewing data for 2012 and 2013, annual goals for increases in member retention, volunteer participation hours, and member donations will be set beginning August 2013 and ongoing.

## GLOSSARY OF TERMS

### ACTIVITIES

**Activities** are the means in which the organization plans to achieve its goals and objectives. The activities are precise and measurable, and they establish a time line for achieving each objective. Activities guide the organization in establishing an operating plan.

### ADMINISTRATIVE STAFF or ADMINISTRATION

Use of the term **Administrative Staff** or **Administration** throughout this document refers to the paid employees and independent contractors of the USTA.

### BOARD or BOD

Use of the term **Board** or **BOD** throughout this document refers to the members of the USTA Board of Directors.

### CORE OPERATING VALUES

**Core Operating Values** are the fundamental values or ideals at the heart of the organization. They articulate ideals that the organization holds itself accountable for and offer guidance about how the organization behaves in carrying out its mission.

### GOALS AND OBJECTIVES

**Goals and objectives** identify the results that the organization intends to achieve within a specific time period to support each strategic direction. **Goals/objectives** are often organized into 3 categories related an organization's 1) **Mission** (programs, services, and public relations), 2) **Administrative and Governance Capacity** and 3) **Financial Stability and Fiscal Responsibility**.

### MISSION

An organization's **Mission Statement** is an opportunity to convey in a concise and compelling way the difference the organization is aiming to make in the world. Stakeholders want to be part of making this happen and they want the organization to be remembered for this in the future

### STAKEHOLDER

A **stakeholder** is simply defined as anyone who cares, or should care about the organization—anyone who has a stake in the success of its mission. This encompasses those who must implement the strategic plan, those who benefit from its implementation, and those who could significantly help or hinder its implementation

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## **STRATEGY**

A **Strategy** is a coordinated direction that determines the way an organization allocates its resources to fulfill its mission. The strategic direction is a succinct statement about the approach an organization will take toward its work over a specific period of time. The statement is based on a combination of both the current environment (the opportunities and threats facing the organization) and the mission and strengths of the organization.

## **USTA**

Reference to the **USTA** throughout this document refers to the members of the United States Trager Association.