

# Strategic Plan 2017

Down syndrome Research, Education and  
Advocacy in Montana

Authors of this document: Rebecca Adams, Heather Hildreth,  
Joe Miller, Jeanette Risteau, Tara Tomac, Tanis Trenka, Luci Brunswick, Christopher Gregory

## INTRODUCTION

Incorporated in 2010, DREAM was founded by a handful of families in the Gallatin Valley who had young children with Down syndrome (Ds). They sought to support each other emotionally and financially. Through hosting annual Buddy Walks with the extraordinary support of our community and families, DREAM has raised tens of thousands of dollars. Most of the money has been given to families who have a child with Down syndrome to help offset medical, therapeutic, and recreational expenses. A small portion of the money is also given to the National Down Syndrome Society to support their research, and for social events for our group. There are no membership requirements: all families with a child or adult who has Down syndrome are welcome.

This document aims to define our strategy, or direction, and provide guidance for decisions on how to allocate our resources to pursue this strategy. The plan will be reviewed annually.

## MISSION

The mission of DREAM is to increase the acceptance and understanding of individuals with Down syndrome in Montana through support, education, and advocacy. We embrace the joys that individuals with Ds bring and also acknowledge the challenges. We aim to provide social, emotional, and financial support to families in need.

## STRATEGIC INITIATIVES

Thanks to our outstanding Buddy Walk committee, DREAM has raised an average of \$25,000 at our recent Buddy Walks. We have also received donations from several other community organizations and sources. Most of the revenue is spent on our Grant program.

Here is a list of our current initiatives:

1. Buddy Walk fundraiser
2. Grants to Families (See Appendix A)
3. Social get-togethers and support group
4. New Parent Outreach
5. Parades and other local outreach/fundraisers
6. Advocacy: Legislative and Community
7. Project Search ([www.montanaprojectsearch.com](http://www.montanaprojectsearch.com))
8. 2025 Reserve Fund
9. Special Olymics

## RECOMMENDATIONS

The current board (i.e. the authors of this report) recommends the following objectives for the next two years:

- Focus:
  - Hosting an annual Buddy Walk in Bozeman
  - Providing grants to families
- Continue:
  - Coordinating a minimum of three annual social gatherings
  - Provide new parents with a gift basket and DREAM information
  - Maintain our website, including updating family stories
  - Supporting Project Search by serving on their steering committee
  - Maintain representation on the Montana Advocacy Coalition
  - Saving for the 2025 Fund
- Explore
  - Possibilities for the 2025 Fund, see Appendix B
  - Opportunities to participate in community awareness events, such as the Sweet Pea parade, SEPTA Special Needs Expo, and others
  - Helping families with trusts and guardianship

The Board is also concerned about future boards being bound to the current initiatives. Given that this is a volunteer Board, we hope that future Boards will judge the utility of programs and adapt them as needed, keeping the focus on the needs of individuals with Ds.

---

## APPENDIX A – How We Decide Grants

DREAM awards DREAM Grants three times a year: during our Board meetings in October, January, and April. The budget currently allows us to disburse \$3,000 per meeting (grant cycle), and dependent on Buddy Walk revenue, we hope to keep this amount constant.

We use the following framework to decide who receives a grant:

1. Severity of the need of the applicant
2. Number of applications received and the total dollar amount requested
3. Number of times an applicant has been awarded a grant prior to the current application.
4. Does it fit the parameters of our grant guidelines?

These variables are all weighed by the Board until a satisfactory balance is found and the money can be distributed in as equitable of a manner as possible.

### Additional Procedures

The President collects the grant applications and forwards them to the Board several days prior to the meeting.

The Treasurer calls the grant applicants to inform them of the Board's decisions.

If the amount awarded during one grant cycle is less than \$3,000 then the extra money rolls over into the next cycle.

If an applicant requests more money than is available, then the applicant can be awarded some portion of their request and then encouraged to apply for the remainder of their request in the next grant cycle.

There is a \$1000 annual limit and a \$3000 lifetime limit for grants that pay for therapies. There is no limit for grants that serve other purposes.

### APPENDIX B – 2025 Fund

The Board is committed to providing opportunities for young adults with Down syndrome upon high school graduation. We have chosen the year 2025 because that is when the oldest child of the founding members of DREAM will graduate from high school. Here are some ideas of what it may be spent on:

	Pro	Con
Housing	Foster independent living There is a huge shortage Possible partnership with Reach?	Limits the number of people we help Possible insurance expenses Staff required, but not necessarily provided by us Qualifying for a loan “Sounds complicated”
Gigi’s Playhouse	It’s a franchise; we don’t have to re-invent the wheel Provides educational and therapeutic programs Open to all	Requires full-time director Lots of fundraising Requires a full Board
Start a Business	Excellent opportunity for kids to learn skills Avoids the post-high school crash Could pay for itself Could be designed for individuals of multiple skill levels	Lots of businesses don’t make it Requires staff Liability risk

### APPENDIX C – Officers and Committees

The Board is encouraged to recruit Board members with Ds and individuals who have children of various ages with Ds. We also seek Board members from the community who may or may not have a relative with Ds.

(Excerpt from the bylaws)

1. The officers of the board shall consist of a Chair, Vice Chair, Secretary, and Treasurer nominated by the Board and voted into office. The positions of Secretary and Treasurer may be, but need not be, held by the same person.
2. Elected officers will serve a term of three years as officers.
3. Duties
  - (a) The Chair shall:
    - a. Organize and preside at all meetings, call meetings, and draft agendas
    - b. Appoint committee members and coordinate with committees (Buddy Walk, Project Search, New Families, and Advocacy.)
    - c. Perform other duties as associated with the office.
  - (b) The Vice-Chair shall:
    - a. Assume the duties of the Chair in the event of the Chair's absence
    - b. Ascend to the Chair position for the following three-year term
    - c. Plan social events and act as "host" at those events
    - d. Coordinate website updates.
  - (c) The Secretary shall:
    - a. Be responsible for the minutes of the Board, keep all approved minutes in a minutes' book, and send out copies of minutes to all board members
    - b. Keep a copy of all grant applications, financial and tax documents, as well as any other significant records.
  - (d) The Treasurer shall:
    - a. Keep record of the organization's budget, prepare semi-annual financial reports, and help develop fundraising plans
    - b. Contact grant applicants after each grant cycle
    - c. Write and delivers thank you/tax EIN letters for non-Buddy Walk donations.

#### Current Committee Members

Buddy Walk Committee: Amber Miller, Tanis Trenka, Betsy Asserson, Ryan Robinson, and Sara Summerford

Project Search: Rebecca Adams, Walker Asserson, Heather Hildreth, Luci Brunswick

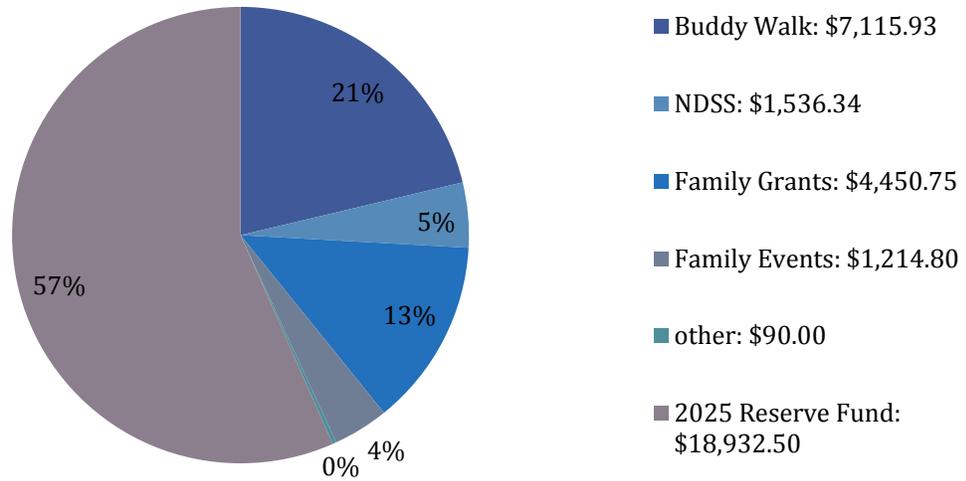
Events: Jeanette Risteau and Tara Tomac

New Family: Ryan Robinson

Advocacy: Julie Kleine, Walker Asserson, Rebecca Adams

APPENDIX D – Financial Overview

Expenses 2016



Income 2016

