



# Horse Empowered Learning Programs Strategic Plan





# Our History

Horse Empowered Learning Programs (H.E.L.P.) was founded in 1984 and ran as fully volunteer-led for many years. The organization achieved Professional Association of Therapeutic Horsemanship (PATH) International certification in the early 1990s, providing additional notoriety and opportunities for program expansion. H.E.L.P. continued to grow in outreach and education and in 2014 hired the current Executive Director, Stephanie Powell.

After 35 years in operation, H.E.L.P. is ready to take the next step towards a bigger and brighter future. 2019 was a year of firsts, with the first annual Horsepower fundraiser event, the first annual report released, and now the creation of the organization's first strategic plan. We are making moves! We are committed to expanding and increasing access to our unique programming while planning for long-term stability of the organization and of course ensuring we keep up the high quality of service we are known for.

We invite you to join and support us in our journey down the ambitious path we have set for the organization!



# Mission and Vision

## H.E.L.P. Mission Statement

To help those with physical, emotional, and cognitive challenges grow in strength and independence through personalized activities in partnership with the horse.

## H.E.L.P. Vision

Changing lives one hoofbeat at a time.

Horse Empowered Learning Programs will be viewed as a center of excellence, setting the standards for therapeutic horsemanship and equine-facilitated learning. We will be known as a trusted leader and presence in the community as we strive to become a premier-accredited PATH center. Building on our longevity, we seek to increase our capacity and stability while offering additional services to those in need, no matter their income level.





# Culture and Core Values

At H.E.L.P. we value and strive for the following in all our endeavors:

## Safety

for clients,  
horses, staff, and  
volunteers

## Honor

patience, grace,  
and respect  
towards each  
other

## Integrity

what you do and  
how you speak  
when no one is  
looking

- Appreciate and recognize contributions from everyone
- Encourage ideas, collaboration, and effective teamwork
- Promote self care and advocacy



# Background and Process

2019 marked H.E.L.P.'s 35th anniversary and for those 35 years it has been a successful but small organization. The organization's leadership are eager to set a new path towards increased stability and growth via this strategic plan, in the hopes that it will allow H.E.L.P. to expand the quality of services and experiences to more clients.

H.E.L.P. is committed to respecting the time and talents of its volunteers and will use this human capital along with financial resources to continue to help those with physical, emotional, and cognitive challenges grow in strength and independence. We will continue to provide needs-based and goal-oriented services to our clients. This tailored approach requires strategic planning specifically in organizational structure, mission advancement, and funding.

In 2018, representatives from the H.E.L.P. Board of Directors (Board) met for a facilitated session with an outside expert consultant with the intent of determining a mission statement, goals, and plans to move the organization forward into its next phase. Throughout 2019, the Board has built on the outcomes of that retreat to draft this document.



# Objectives and Intent

The objective and vision outlined in this document are intended to be utilized by the organization's leadership in **guiding major decisions**. The goals and strategies have been thoughtfully chosen by the leadership for their ability to **promote stability and growth** of the organization while ensuring the most **effective use of resources** in that pursuit. Additionally, it is the hope of the Board that this document **provides transparency** to donors, volunteers, clients, and others interested in the longevity of the organization.



Transparency

Effective Use of Resources

Organizational Stability & Growth



# Implementation and Accountability

The following sections of this document outline three strategic focus areas: **Organizational Structure, Mission Advancement, and Finances and Fundraising**. Within each focus area there are specific goals with actionable strategies.

The Board, specifically the President and Vice President, assume responsibility to ensure the path and values outlined within this document is followed as they guide the organization forward. The specific strategies listed are actions that the Board plans to pursue, in partnership with the Executive Director and staff, over the next two years. The goal is to have implemented all strategies by the end of 2022, or for strategies that do not get implemented, having at least explored those and provided a good reason as to why they were not implemented.

For each strategy, an accompanying implementation plan will be created that includes:

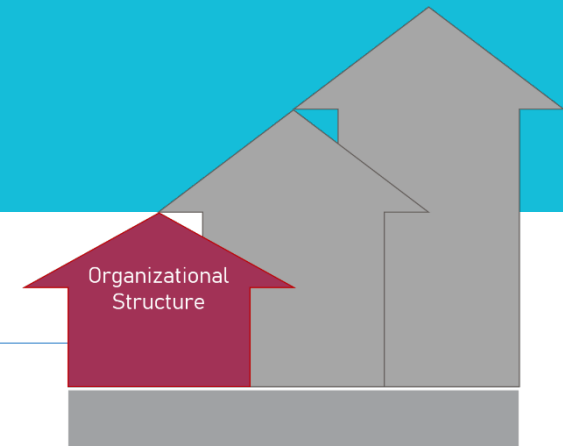
- A Board champion
- Documented actions
- Responsibility
- Indicated barriers or needs
- Target dates and milestones
- Key performance indicators (KPIs) to measure success



# Goals and Strategies

## Organizational Structure

*Ensure effective and transparent leadership*



### Develop a Balanced Board

Having a full and well-rounded board ensures that each individual board member can focus on and execute their roles and tasks effectively while making progress towards achieving the organization's strategic goals. Additionally, a diversity of expertise and strengths on the board leads to better discussion and more informed decision making.

#### Strategies

- Increase board membership to maximum capacity with intentional rounding-out of representation and expertise.
- Include a “Board Blurb” in the newsletter to increase transparency to donors, volunteers, and clients.

### Clear Policies and Procedures

At this time of growth and expansion it is important that those involved in guiding the organization (Board and staff) is clear on their roles, responsibilities, communications, and expectations. There must be formal documentation, agreements, and policies around these items.

#### Strategies

- Update Board bylaws to reflect industry best practices.
- Create and implement necessary policy documentation, including: Employee Handbook, Financial Controls Manual with guidelines for a spending approval process, Conflict of Interest Policy and Procedure.
- Update the Organizational Flow Chart.
- Define clear and effective lines of communication for staff and Board.

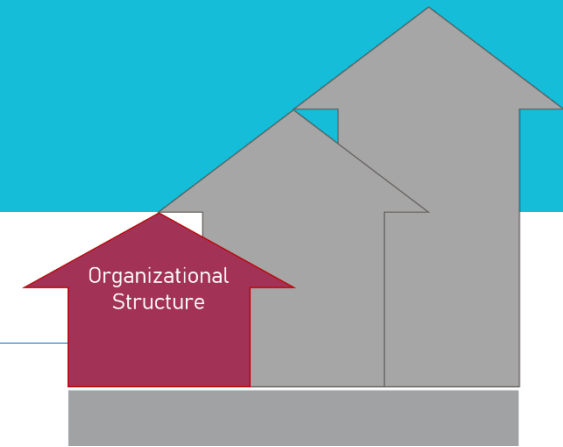




# Goals and Strategies

## Organizational Structure

*Ensure effective and transparent leadership*



### Increase Staff Capacity and Empowerment

With a limited staff it is imperative that we are cognizant of their capacity and careful that the program growth we want to see does not outpace our staff's ability to provide quality service for both clients and volunteers.

#### Strategies

- Hire a new full-time staff position to handle volunteer and development coordination.
- Support professional development for staff through PATH advanced certification and training/mentorship opportunities.
- Implement Annual Performance Reviews tied to annual goals.

### Increase the Effectiveness of Committees

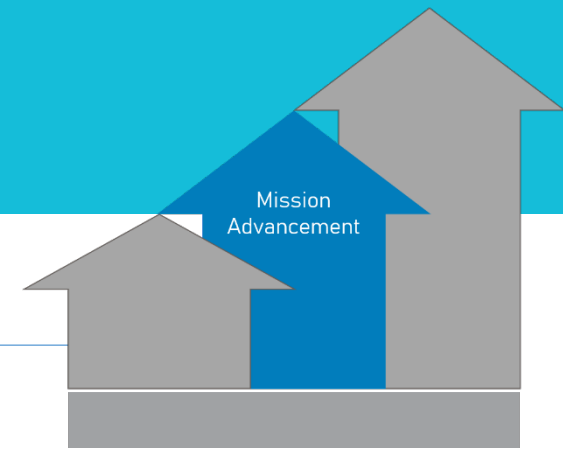
Because we have a small staff, we rely heavily on volunteer committees. The Board must support these committees through strong leadership, clear direction, and accountability.

#### Strategies

- Increase Board communication and interaction with volunteer committees, have a Board representative/liaison actively participating on each committee.
- Empower committee leadership to build efficacy and accountability.



# Goals and Strategies



## Mission Advancement

*Continue providing quality programs and services*

### Increase Volunteer Engagement and Retention

Quality volunteers are the key to running our programs and ensuring the safety and advancement of our clients.

#### Strategies

- Increase volunteer engagement through the implementation and promotion of “volunteer training pathways”.
- Embark on new volunteer recruitment activities focused on filling vital roles and responsibilities.
- Address volunteer fatigue/burnout through creative solutions, such as a volunteer partner program and better utilization of “floaters”.

### Provide Premier Programs and Services

To continue making a positive impact on our community, we must increase the quality and a variety of programs for our clients.

#### Strategies

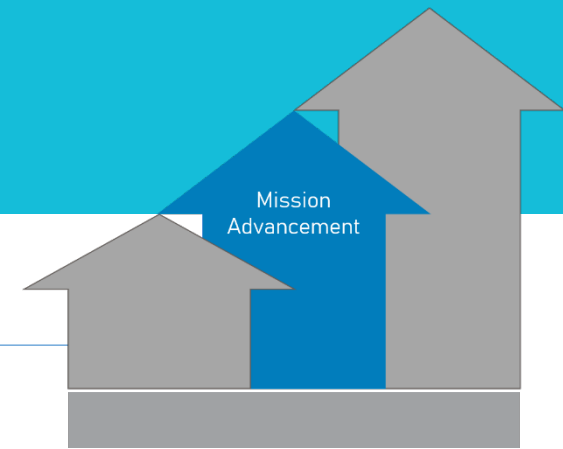
- Increase the number and quality of horse shows offered and the number of clients participating in horse shows, this must include ensuring our horses are physically and mentally prepared to perform in those situations.
- Reduce the number of potential clients on the wait list by offering additional lessons and time slots.
- Implement a reliable and consistent conditioning program, specifically focused on ensuring client safety and horse health.
- Begin a summer camp program or other strategic program that provides new opportunities for clients and volunteers and utilizes the program taking a month off from regular lessons during the summer.



# Goals and Strategies

## Mission Advancement

*Continue providing quality programs and services*



### Stabilize Facility Location and Reliability

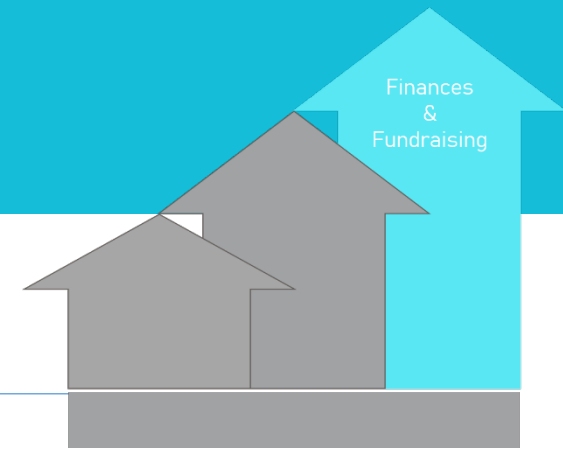
The programs and services we offer require a specialized facility and our clients depend on us to operate in an area of the community that is accessible to them. Additionally, as we grow we may wish to make investments in our facility, however we cannot in good faith use resources to make investments in a facility that we do not have full expectation to be at long-term.

### Strategies

- Work to ensure long-term, continued use of the current facility and/or find a new opportunity at a facility where we can sign a long-term contract.
- Create a plan to prepare in the case of necessary program relocation.
- Add a covered arena and tacking area to minimize cancellations due to weather and to provide shade for the comfort, health, and enjoyment for our clients, volunteers, and horses.
- Consider specialized fundraising or capital campaigns around facility relocation and/or improvements.



# Goals and Strategies



## Finances and Fundraising

*Increase and diversify funding to continue supporting our community of clients, volunteers, and horses*

### Financial Stability

Our future depends on our ability to pay our bills and invest in the organization. Financial stability also provides transparency and confidence for our donors, clients, and volunteers.

#### Strategies

- Participate in low-risk investing to create ongoing passive income.
- Ensure detailed budgeting and bookkeeping to allow for informed decision-making.
- Focus on horse sponsorships in fundraising campaigns, communications, and events.

### Donor Stewardship

Creating a culture of transparency and communication with each donor is our priority. We want our donors to understand how important they are to us and to understand the progress and impact of their donations. Our ultimate goal is to forge lasting relationships with each of our supporters.

#### Strategies

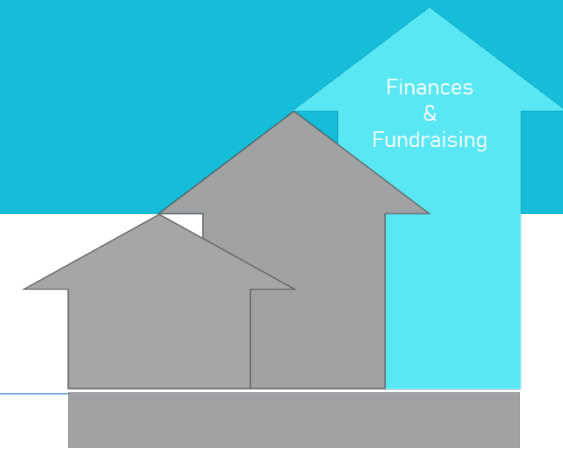
- Attract new donors and increase donor acquisition.
- Decrease donor fatigue for our donor pool.
- Foster deeper relationships with leadership from local businesses and organizations.



# Goals and Strategies

## Finances and Fundraising

*Increase and diversify funding to continue supporting our community of clients, volunteers, and horses*



### Grant Applications

Grants allow our organization to pursue special projects that require specific funding, such as facility improvements and start-up costs for new program offerings.

### Strategies

- Create and foster a Grants Committee.
- Pursue new grant opportunities and increase overall grant applications.

