

Strategic Planning 2018 – Special Equestrians Key Strategic Areas

The focus groups will be meeting as needed, to progress with their action plans.
Quarterly reports will be made on Strategic Planning Progress in each area.
The reports will be presented by the leaders of each group.

1. Leadership

- Succession Plan for key positions
- Written short and long term plan
- Board of Directors need to have more depth (Address Key Skills and Backgrounds)

2. Program Development and Volunteer Base

- Progress of new programs: Hippotherapy, Driving, Veterans
- Year Round Volunteer Support for new programs and expanding TR programs
- Identify Future Opportunities

3. Identify New Funding Opportunities

- Enhanced Grant Activity
- Corporate Sponsorship
- Fundraisers

4. Marketing/Media – Exposure

Develop impact with all forms of media

- Develop Support Literature & Videography



Strategic Focus Area: Leadership

1. Succession Plan for Key Positions

Task	Intent	Activities	Timeline	Responsible Party
Identify candidates for officer positions on Board and have clear succession expectations	Organized Succession Plan and mentoring	Revise job description for each officer position including leadership expectations	2018	Executive Board
		Develop Officer Slate – formal process	Annual	Nominating Committee
		Include Past President to be a member of Board Executive Committee (one year appointment)	Annual	
Document formal management organizational structure	Understanding of job responsibilities and reporting relationships	Update job descriptions	2018	Executive Board
		Update Organizational Reporting Chart	2018	Executive Board
		Identify key positions in organization	2018	Executive Board
Develop Succession Plan for key positions	Organized Succession Plan	Develop an annual update plan for key positions	2018	Executive Board
		Develop plan for initiation of search for key positions	2018	Executive Board
		Develop pay range, budget impact and implementation schedule	2019	Executive Board

2. Written Long-Term Strategic Plan and Formal Annual Objectives

Task	Intent	Activities	Timeline	Responsible Party
Long Strategic Plan	Focused direction for next 24 months	Conduct formal process	June 2018; update on annual basis	Board
		Assign lead board member for each focus area	June 2018	Board
		Lead board member to monitor and report every three months on progress of their focus group. Recommends modifications to Plan as required	January, April, July, September	Lead Board member for each focus group
Written Annual Objectives: <i>Operating Plan outlines the steps to be taken to achieve strategic direction</i>	Goals and priorities for the year using Strategic Plan as guideline	Written Plan providing focus on key activities to achieve desired goals	Annually as part of budget process	Executive Director and Executive Board
		Presentation of Operating Plan to Board at additional meeting with board 1 week before Annual meeting.	October meeting	Executive Director & Executive Board



Strategic Focus Area: Leadership

3. Board of Directors Needs More Depth (Address Key Skills and Backgrounds)

Task	Intent	Activities	Timeline	Responsible Party
Selectively recruit Board members and enhance their understanding of organization	Diversify and build skill sets/experience	Perform a Board Composition Analysis (demographic; profession; term limits; etc.)	2018	Executive Director and Board Chair
		Determine Board needs and list of potential members	2018	Board
		Recruit two new Board members per year	2018 (1) 2019 (2) 2020 (2)	Board
		Update Board Orientation package – Add orientation files to DropBox for access by Board members	2018	Executive Director and Board



Strategic Focus Area: Program Development and Volunteer Base

1. Progress on New Programs: Hippotherapy, Driving, Veterans

Task	Intent	Activities	Timeline	Responsible Party
Formally evaluate new programs	To determine operational impact on organization and future marketing/ growth capacity	Do analysis of each program (Hippotherapy, Driving, Veterans) Impact on operations and resources <ul style="list-style-type: none"> • Relevance to needs of clients • Potential for growth • Opportunities to market 	Conduct review covering 1 st six months of each program	
		Where appropriate, develop Action Plans for expanded growth of programs including Board approval for budgetary impact	2019	
		Specifically address needs for new horses and instructors in Action Plans	2019	Executive Director Stable Committee

2. Year-Round Volunteer Support for New Programs and Expanding TR Programs

Task	Intent	Activities	Timeline	Responsible Party
Recruitment of new volunteers	Expand upon ability to service participants in present and new programs	Recruit volunteers to support specific roles in new programs as well as existing programs: <ul style="list-style-type: none"> • Identify individual volunteers who could be leaders or mentors, and provide advanced training • Market volunteer opportunities through various avenues: websites, media, local communities 	2019	Volunteer Coordinator
		Design and implement Recognition Programs for volunteers (e.g. Volunteer of the Month Profile, monthly recognition at Board meetings, etc.)	2018	Volunteer Coordinator
	Enhance volunteer experience to keep volunteers	Survey volunteers annually for feedback	2018	Volunteer Coordinator



Strategic Focus Area: Program Development and Volunteer Base

3. Identify Future Opportunities

Task	Intent	Activities	Timeline	Responsible Party
Conduct Needs Assessment of community served	Identify opportunities to better serve clients	Selectively survey community partners (e.g. Veterans Center, Autism Agency, Lee County School System, Goodwill, etc.)	2019	Executive Director
Implement needed programs or modify existing services to better meet needs	Better allocate resources to address changing needs	Determine resource requirements	2020	Executive Director and Board
		With Board approval, implement one additional program to supplement current services	2020	Executive Director and Board



Strategic Focus Area: Identify New Funding Opportunities

Adele Smith (head), Brenda Morrow, Freda Jones, Jerry Snyderman, Jan Fifer

1. Enhanced Grant Request Activity

Task	Intent	Activities	Timeline	Responsible Party
Annual grant process	Provide structure, targets and accountability	Develop list of organizational needs lending themselves to grant applications. Establish target dollar amount for budget projections	Annual (July)	Fundraising Committee & Executive Director
		Search grant providers (Foundations) to determine “targets” for applications	Annual (August)	Executive Director
		Prioritize and apply for grants to achieve 2019 and 2020 targets	Annual (September)	Executive Director

2. Corporate Sponsorship

Task	Intent	Activities	Timeline	Responsible Party
Explore application of Corporate Sponsor concept	Potential source of funding	Identify types of sponsorships possible	Annual (June)	Fundraising Committee & Executive Director
		Develop list of potential sponsors	Annual (July)	Fundraising Committee & Executive Director
		Develop specific case for sponsorship and approach corporations and individuals	Annual (August)	Fundraising Committee & Executive Director
		Establish a formal Corporate Sponsor Recognition Program	January 2019	Fundraising Committee & Executive Director



Strategic Focus Area: Identify New Funding Opportunities

3. Fundraisers

Task	Intent	Activities	Timeline	Responsible Party
Review effectiveness and future direction for the two current major fundraisers	To maximize future fundraising and “friend raising” from these events	Research costs and revenue for events over last 5 years	July 2018	Executive Director
		Assess format and organization of two major fundraisers and make appropriate changes	September 2018	Fundraising Committee & Executive Director
		Establish “targets” for events as measured in funds raised	October 2018	Fundraising Committee & Executive Director
Conduct 2-3 “friend raising”/fundraising events on an annual basis	Target prospective donors and start cultivating their interest	Expand Winter Wonderland into a “friend raising” event with a designated open house; Board Members will invite special guests to see program, eat lunch and have a tour	1 st Quarter 2018	Fundraising Committee & Executive Director
		Tour of Love becomes a “friend raising” event; involve Board members in this event. (Tour of Love has already accomplished this and can become more)	3 rd Quarter 2019	Fundraising Committee & Executive Director



Strategic Focus Area: Marketing/Media

1. Develop Impact With All Forms of Media

Task	Intent	Activities	Timeline	Responsible Party
Create a Marketing Plan and Public Relations Strategy	Communicate mission of agency and its activities	Create Board Marketing Committee (consider "outside" members)	Ongoing	Marketing Committee
		Define purpose and scope of Marketing Committee (e.g. to inform, educate and advocate the community about the Special Equestrians and its resources; break out into different programs offered)	2018	Board & Marketing Committee
		Create Marketing/Public Relations Plan	2018	Board & Marketing Committee
		Develop Strategies to cultivate relationships with media	Ongoing	Marketing Committee
	Maintain a visible presence in the community to represent those the agency serves	Identify Press Release Needs; Be more targeted to events and be specific about focused intent	Ongoing	Executive Director
		Publish profile of agency in Florida Weekly (perhaps as "Annual Report")	Annual	Executive Director
		Modify website	2018	Executive Director
		Publish a short Constant Contact Newsletter once a year, using information from "Annual Report"; put in key "Save the Dates" in newsletter	Annual – in November	Executive Director & Marketing Committee
		Develop "elevator speech" for use by employees, volunteers, board members (short speech that anyone can give)	2018	Executive Director & Marketing Committee
		Use partner organizations as "arm" of marketing efforts (e.g. "advertise" volunteer opportunities through Hayloft, Suncoast Credit Union, Publix, Wells Fargo)	Ongoing	Executive Director & Marketing Committee



Strategic Focus Area: Marketing/Media

2. Develop Support Literature & Videography

Task	Intent	Activities	Timeline	Responsible Party
Develop marketing and fund development documents	Formalize a consistent, professional message representing the agency to specific publics	Determine what literature and videos are needed and for which group (including “all purpose” general information document)	2019	Marketing Committee
		Develop budget and timeline	2019	Executive Director & Marketing Committee