

**Lucky Orphans Horse Rescue
Strategic Plan 2019-2023**



LOHR

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Table of Contents

1.0 Overview.....	4
2.0 Mission.....	4
3.0 Vision.....	4
3.1 Revenue Growth and Composition	5
3.2 Construction of an Indoor Arena	5
3.3 Scale-Up the Equine Therapy Program	6
3.4 Director Compensation and Succession Planning.....	7
3.5 Maintain GFAS & TAA Accreditation	7
3.6 Refinance the Property Mortgage Loan	7
4.0 Strengths, Weaknesses, Opportunities and Threats.....	8
4.1 Strengths.....	8
4.2 Weaknesses.....	8
4.3 Opportunities.....	8
4.4 Threats.....	8

1.0 Overview

The Organization

Lucky Orphans Horse Rescue (“LOHR, “Lucky Orphans”, “the Organization”)” is a 501 (c) 3 organization located in Dutchess County, NY committed to raising funds to support a permanent home for rescued horses. The Organization was established in 2008 by its Founder/Executive Director, Deanna Mancuso. LOHR offers permanent sanctuary and care to otherwise unwanted, abused, or neglected horses, and provides them with a safe haven where they would never again experience the situations that led them to LOHR in the first place. LOHR is a no-kill rescue striving to promote the humane treatment of these magnificent animals and to strengthen the bond between horses and people through education.

Lucky Orphans Horse Rescue’s volunteers are committed to working side by side with the horses that have been rescued, to help change the lives of people with a diverse range of struggles such as those suffering from addictions, depression, grief & loss, trauma, at-risk youth, and improving relationships in families and groups, as well as veterans struggling with PTSD and reintegration to civilian life

2019-2023 Strategic Plan

The contents of this document represent the key strategic elements for the Organization across a five-year horizon. This document does not address day-to-day operations but rather strategic and aspirational elements and challenges that when achieved will be significant and positive step changes to this Organization.

2.0 Mission

The mission of Lucky Orphans Horse Rescue is dedicated to providing a safe haven for unwanted, abused, neglected horses and to improve the relationship between horses and humans.

“People Helping Horses Heal People”

3.0 Vision

The vision of Lucky Orphans Horse Rescue is to create a long-term sustainable business model that will ensure the necessary financial and human resources to provide for the Organization to accomplish its Mission year in and year out.

There are several key critical components and building blocks on the path to fully realizing the Organization's Vision. In the prior 3 years we achieved our goal of

constructing our indoor arena which was commemorated during our 10-year anniversary Gala. This arena allows us to continue our work with horses and people year-round. It provides a safe space for learning and healing. Another key factor we achieved was providing Executive Director Compensation. This strategic factor compensates our director for her work, and allows us to plan for succession in the future by providing a budget for a salary for the Executive Director.

The organization's strategic objectives over the next 5 years are as follows:

1. Increase recurring, sustainable revenue streams
2. Scale-up the equine therapeutic program
3. Refinance the property mortgage loan
4. Develop and strengthen board development

3.1 Revenue Growth and Composition

Lucky Orphans Horse Rescue relies on private donors, both individuals and businesses, fee-based programs, fundraising events and the provision of grants where possible to meet its revenue funding goals.

Lucky Orphans Horse Rescue makes every effort to stay current with other organizations offering similar services. Securing the support of the community is vital to the success of the Organization. By being transparent, as well as utilizing strong communication skills and effective fundraising strategies will help the Organization reach its goals. Furthermore, uplifting the community and keeping sponsors, donors, and clients happy is an implicit part of building long-term relationships that will encourage recurring donations and fundraising participation.

Community networking, word of mouth and working with other organizations is a key component to developing long-term relationships that can lead to financial gain in the future.

Private donations from individuals and businesses that are passionate about the mission of LOHR represent our largest revenue source comprising over 50% of our annual revenue. Donation demographics range from large donors who have consistently given over \$2,500 per year, recurring horse sponsorship opportunities, hundreds of small and medium donors, payroll deduction donors, donors of cars and other valuable goods and cash boxes set up at local restaurants and other venues. LOHR welcomes any and all donations large and small; however the primary focus is connecting with individuals who will commit to a long-term relationship with LOHR and the horses.

3.2 Scale-Up the Equine Therapy Program

In 2015 LOHR continued to provide limited Equine Assisted Psychotherapy and Equine Assisted Learning for mental health treatment and human development

services. Our EAGALA certified, Natural Lifemanship (Trauma-Focused Equine Assisted Psychotherapy) trained facilitators work with clients in private sessions and workshops.

LOHR's horses are used to provide the above mental health and human development services utilizing a team approach. Each team consists of a mental health professional and equine specialist. The operating model includes co-payments from clients and payment for remaining fees from insurance companies, scholarships, endowments, donations, or the client themselves. After payment for services to the mental health professional, LOHR receives payment for the use of their horses and facility.

Scaling-up the therapeutic program have several dependencies:

1. Full-time mental health professional(s) (salary required)
2. Full-time Equine specialist, or multiple Equine specialists to share the workload (salary required)
3. Ability to process Medicaid and other insurance claims for clients
4. Assurance of following HIPAA guidelines

Equine therapy and human development programs are one of the strategic objectives to grow LOHR's revenue; however a grant or other funding may be necessary to fund the growth of the therapeutic program from its current part-time basis to a full-time program and a substantial source of revenue.

3.3 Refinance the Property Mortgage Loan

In 2015 in connection with the property acquisition LOHR entered into a 5-year interest only mortgage note for \$600,000. This note comes due on July 1, 2010. In July 2020 LOHR will have \$60,000 available to offer as a down payment to refinance the mortgage.

4.0 Strengths, Weaknesses, Opportunities and Threats

4.1 Strengths

Dedicated leadership

Core group of dedicated and long tenured volunteers

Achievement of key vision elements / building blocks in recent history

Receipt of sizable donation for indoor arena

GFAS accreditation

TAA accreditation

4.2 Weaknesses

Limited donor base
Competition with other charities (both animal and people based)
High breakeven point

4.3 Opportunities

Therapy programs
Limited competition in our region
Partnerships with other community organizations
Social media
Branding

4.4 Threats

Cost inflation for horse care and facility operation
Volunteer fatigue and departure
Revenue decline / donor fatigue
Change / rapid growth fatigue