

# LifeStriders Inc.

## Strategic Plan 2015-2019

### Mission Statement

*Providing life-enhancing, physical and psychological experiences and therapeutic services, to individuals with special needs.*

### Vision

LifeStriders' Strategic Plan Vision is to provide integrative therapeutic programs that serve more people in a variety of innovative ways, to meet the needs of diverse populations and to broaden our geographical reach within a sustainable model.

### Values

#### Quality

LifeStriders is committed to the highest level of quality throughout our programs, in our care for horses and in our interaction with participants, volunteers, donors and other members of the community.

#### Teamwork

LifeStriders' certified instructors, qualified staff and committed volunteers work together to create an inclusive environment providing the optimal experience for participants.

#### Education

LifeStriders promotes education within the field of Equine Assisted Activities and Therapy (EAAT) and values learning in collaboration with our participants and community. Our partnerships with local colleges and Universities, promotes internship and educational opportunities in related fields.

#### Leadership & Innovation

LifeStriders develops leaders who are committed to excellence, current with advances in EAAT, and eager to share innovative solutions that will enhance the experience for participants today and in the future.

#### Serving the Community

LifeStriders strives to effectively serve its community and to be an active and valued community participant.

## Organizational Background

### History

LifeStriders was founded in 2004 by Veronica Sosa Agnoli, MS, LPC who is an educational psychologist and licensed counselor and Robert Conley, MSPT who holds a master's degree in physical therapy. While therapeutic riding centers are a proven and successful way to enhance the lives and skills of persons with special needs, none existed in our community. In the summer of 2005, LifeStriders opened its doors to provide professional therapeutic equine activities and equine facilitated mental health to children, adults, and seniors with disabilities in southeast Wisconsin. LifeStriders has been a member center of the Professional Association of Therapeutic Horsemanship, International since 2005.

In January of 2011, after a successful capital campaign, LifeStriders purchased a local farm renovated it to meet current accessibility demands. LifeStriders is proud of the fact that it owns the facility with zero debt! Today, LifeStriders is one of the state's largest, and fastest growing, therapeutic riding centers and the only PATH certified center serving Waukesha, Milwaukee and Jefferson Counties. In 2013, LifeStriders has provided over 2,500 lessons and groups counseling sessions with a volunteer base of over 100 people that includes physical therapists, psychologists, occupational therapists, educators, horsemen and women, and students from local schools, all of whom enjoy working with horses and helping others.



### Programs and Services

A. LifeStriders Therapeutic Riding and Occupational Therapy program (hippotherapy) incorporates elements of cognitive behavioral therapy, occupational therapy, and physical therapy with horseback riding to treat patients in a fun and interactive manner.

B. LifeStriders Heroes program utilizes therapeutic riding to treat military veterans with mental or

physical disabilities. It also teaches veterans coping skills, physical and mental balance, and helps them transition back into society.

C. LifeStriders Social Skills Groups increase the social skills and social awareness of children and teens with social skills deficiencies. This program also teaches bullying and violence prevention and intervention, interpersonal communication skills, and conflict resolution.

D. LifeStriders Youth Program provides community service, character-building, dropout prevention, and violence prevention to Milwaukee and Waukesha County at-risk youth ages 12-21.

#### No and Low Cost Services Offered

- No Cost -Veteran services include Therapeutic Riding and Counseling
- No Cost- Youth Program

Low Cost/sliding scale- Therapeutic Riding/Hippotherapy, Counseling and Social Skills Groups when services for the uninsured or under insured for all populations.

#### Who We Serve

Participants come to LifeStriders from special education classes at local schools, as referrals from physicians, social service agencies, group homes, rehabilitation centers and through individual referrals by other participants. The challenges faced by our participants include autism, cerebral palsy, Down syndrome, muscular dystrophy, visual and hearing impairments, emotional and social behavior disorders, and traumatic brain and spinal cord injuries.

Participants range in age from 2 to 83 years; 56% are 13 years old or younger. They come from Milwaukee, Waukesha, Jefferson and surrounding counties.

We serve SE Wisconsin through school in-service programs, field trips and experiential learning opportunities provided both on-site and by visits to schools, senior centers and other local community groups. We are also dedicated to providing advocacy for people with disabilities, family education and support and training for therapeutic riding instructors.



## Community Collaborations

LifeStriders enhances many existing services in the community by collaborating with many local schools, hospitals and government agencies. We receive direct referrals from medical and psychiatric staff from Milwaukee VA Hospital, Children's Hospital, Roger's Memorial Hospital, Waukesha Memorial Hospital and Rehabilitation Center, New Berlin Therapies and other medical facilities. We have special therapeutic riding classes for the Milwaukee Center for Independence (Traumatic Brain Injury Unit) and Lad Lake/ St. Rose (residential treatment program for struggling youth). Case managers from other agencies like Milwaukee and Waukesha County's Departments of Health and Human Services, La Casa de Esperanza, IRIS, ARCH, Hebron House, the Women's Center refer participants to LifeStriders for the various programs and support services offered. LifeStriders also works closely with local public and non-public schools to best meet the needs of at-risk students as an adjunct support service.

## Major Accomplishments

**2004-** Began offering no cost or low cost therapeutic services for special needs families who are unable to pay for services or not covered by insurance or Medicaid.

**2005-** Provides at-risk youth and mentoring services free of charge to over 100 children and teens per year.

**2010 -** Purchased the current 23 acre facility and continues to be 100% debt free.

**2011-** Began serving military families dealing with the stressors of deployment, physical, and/or emotional disabilities, at no cost to them. Began offering specialized therapeutic programming for the elderly and those affected with Alzheimer's.

**2012-** Occupational therapists and interns expanded the LifeStriders' Hippotherapy program in addition to the already existing therapeutic riding program.

**2013 -** The number of individuals treated from 2010 across all programs offered at LifeStriders has increased five-fold.

**2014-** Launched an initiative to serve additional inner-city Milwaukee residents through collaborative efforts with Milwaukee agencies.



## The Strategic Planning Process

The initial goal of the Strategic Planning Committee was to formulate key strategic issues. The first strategic planning initiative was focused on operational excellence, followed by the 2009 revision which emphasized expansion of services and included the purchase of the current facility and the operational growth that ensued.

In 2012/13, we completed our three-year strategic plan, defining our focus for the future. Our main strategic goals through 2015 were to:

- Deliver exemplary programs that add value to the lives of our participants. (Status — We are continuing to expand our Therapeutic Riding programs to meet the growing needs of the community, including veterans, inner city students, grieving families and seniors. To grow the occupational therapy, counseling and social skills program)
- Provide an outstanding environment that attracts, develops and retains energized and effective employees, volunteers, board members and horses.
- To add effective board members, composed of experienced and dedicated individuals from varied backgrounds and skill sets that will be leaders in promoting LifeStriders mission and connect us with other prominent community leaders.
- Achieve financial stability and growth through broad-based funding and fiscally responsible resource management.
- To create a board approved an endowment campaign to ensure a stable financial future for the organization.

In 2014, with the addition of 2 new board members the Strategic Planning Committee felt the organization was in a much stronger position, making it possible to ask new questions, take new risks and respond to new opportunities. In the discovery phase of the Strategic Planning process, five strategic opportunities and challenges emerged:

### **Expanding Services to Inner City Residents**

A collaboration with various Milwaukee agencies to make LifeStriders services more accessible to clients. Collaborating with the Milwaukee Police Department- Mounted Patrol Milwaukee Community Equestrian Center whereby LifeStriders would expand services to downtown Milwaukee by 2015/2016. Since the initial terms of the project were not agreed upon, LifeStriders will continue to seek other inner-city collaborations, ie MCFI, Silver Spring Neighborhood Center etc.





### **Build a Sustainable Income/Capital Model and Explore Alternative Funding Sources**

Participant fees cover only 30% of LifeStriders' total operational expenses. Despite having an active and successful fundraising program financial projections over the next five years show expenses exceeding projected revenue. To prevent this, LifeStriders needs to improve its existing revenue sources, accurately communicate the value proposition for our services and examine productivity outcomes and their impact. An analysis of the feasibility for conducting a capital and/or endowment campaign will also be explored. The role of a business development specialist was revisited and the position was authorized by the board in 2012.

### **Infrastructure/Capital Improvement Projects**

LifeStriders will ensure that human and equine resources are positioned to support its programs and safety into the future. Understanding that its facilities, land use and technology needs are critical to safe and effective programming.



## Strategic Goals and Action Steps

### GOAL 1 Program

LifeStriders will maintain a strong leadership role within the field of Equine Assisted Activities and Therapies (EAAT), psychotherapy and occupational therapy through the continued evolution and innovation of program services, providing high quality, individualized programming.

#### Program **Action Steps**

LifeStriders will continue to examine current programs services and designed new offerings to optimize existing resources while providing participants with enhanced experiences.

- Medicaid provider
- Additional Insurance carriers
- Increase occupational therapy program
- Increase counseling program
- Increase social skills program
- Medical billing for clients

### GOAL 2 Employee Satisfaction and Retention- Our Team

LifeStriders is governed by a Board of Directors that is actively engaged with and manages a professional staff of highly trained therapists, therapeutic riding instructors and equine specialists, many of whom are volunteers. The LifeStriders team is augmented by over 100+ active volunteers who further support daily operations. LifeStriders will continue to understand the needs of our staff to ensure a rewarding, professional environment that fosters growth and fulfillment.

#### Employee Satisfaction and Retention **Action Steps**

- LifeStriders will create paid opportunities for critical business functions. PT bookkeeper, PT business Development/Grant writer
- Hire additional counselors, OT's, PT's or speech therapists, barn assistant
- Offer competitive compensation/ bonus
- Health Insurance
- Retirement savings options



### GOAL 3 Infrastructure and Facilities

LifeStriders will ensure that human and equine resources are positioned to support its programs and safety into the future. Understanding that its facilities, land use and technology needs are critical to safe and effective programming.

#### Infrastructure **Action Steps**

Conduct organizational inquiries and capacity analysis to identify constraints in all areas and respond by developing and implementing an optimal resource model.

- New Arena Footing (completed 2014)
- Tractor (completed 2014)
- Barn remodel to include better lighting and ventilation
- Concrete stall floors with mats to include tack room
- Update stalls and replace stall doors
- Create new counseling office for additional therapists (completed 2014)
- Create additional pasture space electric wood combination (completed 2014)
- Build or install 3 additional shelters
- Parking





## GOAL 4 Finance

LifeStriders will create a robust financial model which will support program growth and innovation into the future.

### **Finance Action Steps**

Analyze, present and future projected expenses to identify and implement ways to increase efficiency and increase potential savings. Develop recommendations to address funding gaps including optimization of the fee structure and scholarship policies, expanded fund development efforts and identification of new revenue generating activities.

- BOD will introduce and help foster new donor relationships
- Add BOD that will understand and fulfill their fundraising duties and responsibilities
- Hire a business development specialist/consultant to spearhead the fundraising goals and direction
- Fundraising events for 2-3 demographic profiles a year run by a 3<sup>rd</sup> party
- Donor recognition wall

## Goal 5 -Governance

LifeStriders will ensure that a governance structure is in place which supports a strong and diversified board capable of providing the leadership needed to fulfill the mission.

### **Governance Action Steps**

Examine current structure, policies and practices of the Board and committees to ensure that the composition and activities of the Board are aligned with the needs of the organization. Increase engagement of staff and officers in fund development activities. Increase diversity on committees and the Board to increase community involvement and to support a culture of innovation and philanthropy.

- Organization able to transition from Rob and Veronica
- Elect new treasurer, president
- Add 2 new board members per year to fill key BOD positions and chair committees as needed