

GAIT Therapeutic Riding Center

***Strategic Planning Session
(October 21, 2023)***

This document includes the following segments, based on the strategic planning process:

- **Project Background:** The planning team and process.
- **The Profile of the Plan:** The overall goal and parameters that focus the plan.
- **Situation Analysis:** The major factors resulting from situation analysis, upon which the strategies are based.
- **Strategies and Recommendations:** The major strategies and recommendations that drive actual resolutions approved by the GIAT Board of Directors with support of its Executive Director.
- **Appendix:** Supplemental detailed information referenced in the context of the plan.

Project Background

Strategic Planning Team:

- **GAIT Board Members**
- **GAIT Staff Members**

The Planning Process

- GAIT's Board and Staff Members held a meeting October 21, 2023, to outline the scope and focus of the plan and outline the process for updating the GAIT Business Plan from year 2023 to year 2024.
- Prior to the meeting, all invited meeting members were forwarded the current GAIT Business Plan and well as other information relevant to a discussion about leadership/management.
- SWOT feedback summarized from the 10/21/23 Meeting (below).
- Recommendations changes to the GAIT Business Plan's "Goals, Objective & Strategies" (Pages 10-11) and the Critical Success Factors (Page 25) will be presented for review and approval of the GAIT Board of Directors at the November 17, 2023, Meeting.

The Profile of the Plan

Overall Goal:

The overall goal is a long-term, visionary goal, stated as a question:

What are the key ways and means to continue to subsidize and to expand the goals and objectives of its Mission Statement? (***“To improve the quality of life of children and adults with special needs through equine activities and therapies, resulting in a more independent life in society.”***)

Parameters:

The plan considers all functions, programs and services offered by GAIT.

- The Business Plan will seek to address the weaknesses and threats as well as review the strengths and opportunities identified in Situation Analysis.
- All key Goals, Strategies & Objectives approved by GAIT’s Board of Directors will result in specific actions supported by adequate budgets and will be planned for the next 3 years.

Situation Analysis

Key Points from Situation Analysis

The following list summarizes key feedback/factors derived from the Situation Analysis and the SWOT Worksheet (provided on the following pages).

Situation Analysis

SWOT Worksheet

STRENGTHS: (Internal)

- Quiet herd suitable for a variety of programs, EAL, EAP, HPR, etc.
- Core group of talented therapists, instructors, ESMH, Horse Wranglers EAL, EFP practitioner with diverse skill sets.
- Core group of our parents, participants, community are very active.
- Professional workshop are key
- Stellar and dedicated staff and experts
- Worldwide recognition
- Great herd of Horses (some a work in progress, RJ!)
- Executive Directors: past and present
- Staff
- Instructors
- Dedicated Volunteers
- Involved Board of Directors
- Advisory Council
- Well maintained facility
- Individualized attention for clients' needs/flexible scheduling year round
- Experienced with a wide range of client challenges
- Flexible schedule (dependent on availability of instructors)
- Staying true to its core mission and vision
- 26 years of history and of producing new initiatives
- Reputation/credentials of Martha
- Reputation/credentials of Vera
- Positive connections and support within the local Community
- Having a labyrinth (need dedication?)

OPPORTUNITIES: (External)

- We can use Progressive as model for other Arena and EAL programs, need pics, video if permitted, when we are trying to lure ore participants from the above lists
- Develop a you tube channel to give clients "on demand" access to things they want to review or need to help in everyday activities
- Do specific fund raising for individually needed equipment, i.e., designated round pen for veterans, EAL, EFP. HPR
- Partner with any local group that has a van/bus at its disposal to schedule availability to take veterans, community members, seniors to GAIT on a regular dependable schedule which we can schedule activities around
- Develop new page on website to advertise each program in rotation perhaps, FB, Instagram, etc

- We are on cusp of newly formed PATH EAL certifications. We can eventually offer training in sub certificates if PATH gets their stuff together, It's going a lot like ESMHL went when we asked to be new faculty- slow and difficult
- We are located next to Malibu. Is there is an opportunity there to access their trails, arena, equines. Also offer our services in some way
- Identify grant/funds for van and or some other mobile transportation to bring our services to the community or clients to GAIT
- New programs (Horse Powered Reading, Veterans, 4H, workshops, rehab groups, schools)
- What are other Centers doing that GAIT does not, but could?
- Raising funds from corporations and businesses, recruiting more volunteers, expanding the facilities/land for more horses, upgrading software to receive payments and organizing large numbers of classes more easily
- Volunteer Appreciation events
- Story telling about GAIT
- Facility close to town
- Speaking to parents, guardians of clients
- Partnerships friendships cultivation
- Progressive Rehab type clients
- Pre-Post testing – testimonials
- Looking at bigger grants – HHF pilot/research type
- Joint funding with other organizations
- More publicity with joint venturing/collaboration
- Hold promo events at other venues
- Solicit horse feed and drug companies
- Horse Show at GAIT
- Workshop expansion on or off site
- EAL opportunities
- Organizations for new volunteer (Patti)
- Nonequine experiential community programs
- More GAIT participation at Community events/outreach
- Expand and collaborate/working with caregivers – such as Karen Ann Quinlan Hospice – ther nonprofit populations
- Publicize when we collaborate/partner with other organizations

WEAKNESSES (Internal)

- One more horse would be nice
- Supply of needed funding spread thin over many organizations
- No designated round pen for veterans, EAL, EFP. HPR
- No plan in place to Enlarge numbers already being served by programs such as, TR, EAL, HPR. EFP, by contacting nearby/national organizations, school systems, local residential programs, MHP's
- Outreach for new Board members
- Collaborate with Centenary or other schools/universities
- Location forces discomfort for some people to find and drive to
- No plan in place to Initiate new programs, such as, Home school family services

- No plan to Advertise/enlarge mentor program which will help with enhanced services offered by enlarging the number of participants may be served.
- Difficulty with fund raising attempts; small pool from which to solicit funds
- Recently Laurie Bryceland sent a “thank you” email message to all who had supported a recent event (I think a Road Rally). There was a long, really long, list of supporters. I wondered how VH manages to attract so many. I counted: 50. Is the location so different, maybe fewer competitors?
- I remember Omar (Sian’s husband) saying that an organization should not depend on fund raising to cover operating expenses.
- Aging horses that may need more care or are lost
- Enough instructors and volunteers and leaders to meet schedule needs
- Limited resources, limited ability to raise funds, limited number of stall, too few riders
- Need more supporters of all kinds (financial, volunteers)
- Need more clients
- Lack of awareness about GAIT
- Need enrichment activities
- Need higher education connections
- Need to reach beyond local community for connections
- Need a Minnie with trailer to transport to events
- Attract new Board members with deeper pockets
- Need to become profitable
- Need a traveling show to promote GAIT

THREATS: (External)

- ESMHL attendance seems to be waning. Develop plan to enlarge participant base, such as, appealing to horse trainers, educators with their own horses, nearby barns, local horse organizations. Mental health practitioners, residential caretakers.
- People in community don’t know we are here. (Need a sign like Malibu’s sign on Seventh Street)
- After the recent accident I’d like to suggest that we attend a short “in-service” meeting about writing an incident report.
- Identify program director. (A lot of these future programs can be imputed into calendar for attention in the future).
- Loss of revenue
- Not to have a sustainable fund resource, facility getting old, natural disasters (fire, severe weather, etc.
- GAIT’s competition from other horsemanship centers
- Overscheduling (or lack thereof)
- Lawsuits
- Spreading itself too thin/scattershot approach trying to do too many things
- Bad press (internal/external)
- Increased expenses
- EPA issues
- Aging indoor area facility
- Township rules and regulations, permitting, uses
- Retention of volunteers, staff and Board members
- Capacity to provide programs and services at a level to create a profit
- Screen time in competition with outdoor activities

Strategies are directly linked to the results of Situation Analysis—especially the Key Points and the factors listed on the SWOT Worksheet. Strategies are grouped in 3 major areas, each specifically described in this section of the plan.

Based on the feedback from the October 21, 2023, Strategic Planning Session, it is my recommendation that we “stay the course” related to our “Goals, Strategies & Objectives” as outlined in the GAIT Business Plan (see below pages 10-13).

We have made progress in terms of growing awareness about GAIT and its services and programs; we have added to our capacity to meet expanded demand for GAIT’s services and programs by engaging additional contracted CTRI and ESMHL professionals; and, we have identified ways and means via grants and fundraising, Employee Retention Credit funding and beta-testing/promoting new Equine Assisted Learning services and programs.

In addition, it is my recommendation that the Board of Directors review and approve an organizational entity name change for 2024 from “GAIT Therapeutic Riding Center” to “GAIT Therapeutic Horsemanship Center” to reflect a shift in the chief business emphasis from “Riding” to “Horsemanship” (as riding is a function of horsemanship).

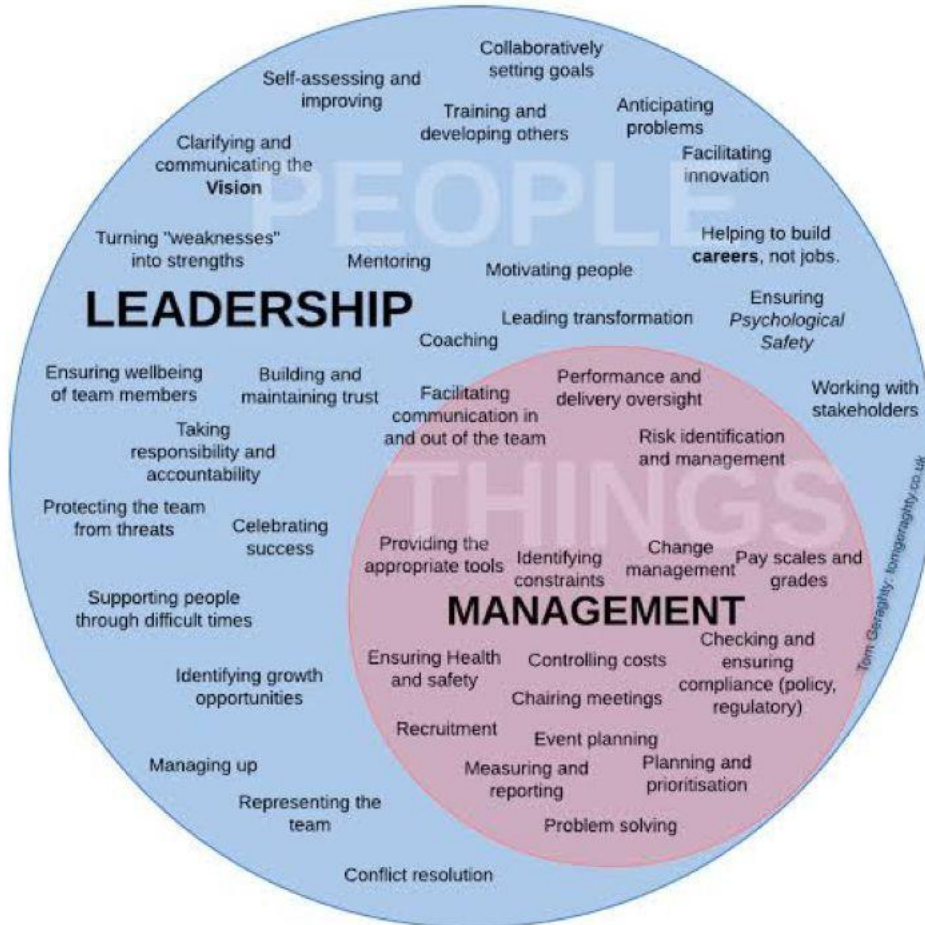
The 2024 Goals Strategies and Objectives:

- 1. (From 2023) Expand awareness about GAIT’s core services and programs within the local community and throughout the tri-state area of Pennsylvania, New York and New Jersey.**
- 2. (From 2023) Establish the organizational infrastructure to meet the requirements of an expanded demand for equine therapeutic riding services and programs.**
- 3. (From 2023) Establish viable ways and means for long-term organizational and financial sustainability.**
- 4. (For 2024) Change and promote change of organizational entity name to GAIT Therapeutic Horsemanship Center.**

The 2024 Annual Operating Budget Impact:

Will be similar to 2023 with expectations of additional clients and additional fundraising opportunities from grants and traditional fundraising events planned throughout the year.

Appendix



Leadership versus Management

Leadership is all about enhancing and enabling people to develop to their fullest potential by developing their abilities and empowering them to become their best versions. Here is why.

If you were to Google 'leadership' you will get millions of results. They will cover such a wide range of qualities, attributes, traits, and skills that are simply impossible for one leader to acquire and excel at.

Leadership is often confused with 'management'.

Management is the ability to get results, meet targets, set performance standards, build systems and define processes; these are all about managing the organization and its people.

That involves actions such as building rapport and developing relationships.

It requires the leader to build an understanding of personalities, values, and beliefs of their teams and stakeholders.

It demands that a leader listen to people and unearth perspectives, concerns, ideas and feelings and build consensus, alignment and collaboration.

Leaders have to focus on both aspects. The first aspect is the technical or functional dimension of being a manager and ensuring that the organizational wheels are moving in an aligned and consistent manner

The second aspect is to build the human skills required to motivate, influence and inspire people.

The one true responsibility of a leader is to enable others to grow and develop to their highest potential

Managers focus on	Leadership focuses on
<ul style="list-style-type: none">• Goals & objectives• Telling how and when• Shorter range• Organization & structure• Autocracy• Restraining• Maintaining• Conforming• Imitating• Administrating• Directing & Controlling• Procedures• Consistency• Risk-avoidance• Bottom line	<ul style="list-style-type: none">• Vision• Selling what and why• Longer range• People• Democracy• Enabling• Developing• Challenging• Originating• Innovating• Inspiring trust• Policy• Flexibility• Risk-opportunity• Top line
Good managers do the things right	Good leadership does the right thing

From GAIT 2023 Business Plan (Pages 10-11)
GOALS, STRATEGIES & OBJECTIVES

Overall Goals and Objectives

The human-animal bond encouraged in all equine assisted learning programs at GAIT TRC provides an environment for development of speech, sensory-processing, and the ability to experience the world around them in a safe and tolerant atmosphere. Riding improves general fitness strength, short-term memory and problem-solving skills while increasing self-awareness, appropriate self-expression, and a sense of empowerment through trust and team building activities. Research has shown that the symmetrical, rhythmic motion of the horse helps individuals “organize” and improve proprioception, sensory-processing, coordination, body awareness, mid-line orientation, right and left directions and gives a general feeling of well-being. In working toward accomplishing these goals, GAIT TRC is able to achieve its mission:

“TO IMPROVE THE QUALITY OF LIFE OF CHILDREN AND ADULTS WITH SPECIAL NEEDS THROUGH EQUINE-ASSISTED SERVICES RESULTING IN A MORE INDEPENDENT LIFE IN SOCIETY.”

Over the next three years GAIT will pursue the following goals, objectives, and strategies.

Goal One: Expand awareness about GAIT’s core services and programs within the local community and throughout the tri-state area of Pennsylvania, New York and New Jersey.

Objectives:

1. Analyze and utilize cost-effective ways and means to promote and market GAIT’s services and programs within the local community of Milford. PA, within Pike County, Pennsylvania and within the tri-state area.
2. Engage state and county governmental resource agencies, community leaders and area residents to determine how GAIT can reach and best serve the community by meeting the needs of individuals who will benefit by equine assisted programs and services.
3. Host onsite “open-house” events that feature information and explanation about specific services and programs that focus on outreach to specialized target groups such as Veterans and their families, wellness center populations, rehabilitation clients by offering therapeutic riding and other experiential and EAL programs that feature horses and horsemanship.

Strategies:

1. Develop a plan to utilize community social and business communication methods by publishing consistently all of GAIT's activities, services and programs.
2. Create formal, ongoing partnerships with area social, business, governmental, medical/healthcare organizations that can enhance broad-based awareness about GAIT programs and services.
3. Seek essential funding for focused marketing and promotion of GAIT services and programs through fundraising and grant application funding.

Goal Two: Establish the organizational infrastructure to meet the requirements of an expanded demand for equine therapeutic riding services and programs.

Objectives:

1. Sustain and grow a viable nonprofit organization to ensure a high-quality, year-round facility. The barn, arena and outdoor areas will be maintained to ensure that they meet all life safety and comfort standards for people and horses.
2. Analyze and improve business systems that best support programs and administrative tasks to operate at full capacity. Update written policies and procedures that describe management and budgeting for all services, programs, activities and administrative practices.
3. Management, with Board of Directors oversight, will continue to define clear lines of responsibility and accountability of current activities and will set the stage for future growth. Job descriptions will be created/updated for all positions. GAIT will attract and retain full and part-time staff as well as consultants well-qualified to perform their respective tasks.

Strategies:

1. Maintain a corporate structure capable of operating multiple lines of business and that can accommodate income stream growth. Initially, these income streams include fee-based GAIT's core services, programs and activities, as well as experiential and educational learning activities. Administrative and professional support functions will be centralized such that each line of business can focus on service and program delivery.
2. Periodically update in accordance with best corporate practices, all aspects of board governance, and professional equine instruction/teaching management to include feedback from key stakeholders to include donors, grant-funding providers and participants utilizing the services and programs.

3. Engage external evaluators to design and implement comprehensive programs and service evaluation protocols. Based on ongoing evaluation of governance and management operations, update all curricula, program policies and procedures, job descriptions, and administrative functions.

Goal Three: Establish viable ways and means for long-term organizational and financial sustainability.

Objectives

1. Create/review/adhere to a three-year business-budget plan that includes projected income growth through fundraising campaigns and securing grant application funding from a wide variety of foundations that support equine related nonprofits such as therapeutic riding/horsemanship/learning centers. Define/refine corporate business focus to funding/managing fewer goals, objectives, programs and services and doing well what is focused upon.
2. Initiate an endowment campaign to raise funds to secure longer-termed business operations.
3. Create a strong demand for fee-for-service revenue from therapeutic riding/horsemanship/learning related services and programs to include other revenue resources derived from hosting summer camps and social and business workshops.

Strategies

1. The GAIT Board of Directors will continue to be actively engaged in setting strategy, providing management oversight, and playing a direct role in assuring that GAIT has the financial resources, including requisite fundraising, to be sustainable.
2. Continue to review feasibility studies for raising endowment funds through capital campaigns that support capital improvements as well as to establish an endowment or an operating reserve fund to support and sustain long-term maintenance and operations.
3. Undertake a capital campaign with the support of individuals and foundation interest and support, locally and nationally, within the equine community as well as to institutional philanthropy and major donors interested in use of horses in the development of services and programs.

**Recommended update(s) (FY24-26) to GAIT 2023 Business Plan (Page 25)
FOR CRITICAL SUCCESS FACTORS**

Task:	Goal:	Comments:
FY24		
Continue to increase community and tri-state awareness about GAIT's EAL services and programs and other experiential activities and events.	Support/enhance all aspects of a high-quality, year-round equine therapeutic facility.	Continue engagement of Board, Staff, Volunteers and Executive Director in order achieve fundraising, grants and business income goals and objectives.
Increase operational funding via grants, fundraisers and increased number of clients led by ED, Accounting Associate and Board of Directors.	Ensure/increase ongoing operational capacity and secure financial sustainability.	Target donors, including high-net-worth individuals within the multi-disciplined, equestrian communities and urge Board members to build and sustain fundraising momentum.
Develop specific EAL programs that addresses specific needs for targeted participant groups.	Add 7-10 new participants in each service or program	Increase general awareness in the community about all services and programs. Review equine capacity.
Continue to initiate and forge ongoing partnerships with community business and social organizations.	Expand and enhance programs and services to serve an increased number of individuals.	Focus on human resource centers, schools, social organizations and community business leaders to recruit community support.
Solicit, train and retain trained Volunteers, CTIRs and ESHMLs and horses in order to grow and maintain business capacity; review Board term renewals/replacements.	To be able to fill all required Staff, equine professionals and Volunteers, as well as all Board positions	Retention of valued Staff, Volunteers, equine professionals and Board members are essential for continuity of business operations over time and known and unknown circumstance(s).
FY25		
Update FY24 strategic planning goals and expectations to determine future organizational and financial planning/viability.	Review organizational infrastructure and identify additional key stakeholders.	Board/Staff provide strategic advice, adhere to operations best practices, and provide financial resources. Volunteers needed and retained.
Review/Revise/Implement facility and site drainage improvements that ensure long-range use of the facility.	Sustain business operations as a high quality, year-round, EAL facility.	Barn, arena and outdoor areas maintained to meet all life safety and comfort standards for people and horses.
FY26		
Review ways and means to create and maintain a corporate structure capable of operating a multi-faceted, nonprofit business.	Evaluate Board and Staff roles, duties and responsibilities for long-term success.	Review Board, Staff and advisory council(s) education, communication, and participation. Create/update job descriptions and business plan(s).
Expand community links and establish networks to recruit new program enrollees.	Add 10 new participants in each service or program	Establish new business contacts and plan for business awareness. Review fee structure for services and programs.
Secure third-party funding to support special needs individuals at low or no cost to the individuals.	Reduce/eliminate fees to individuals through grant funding support.	Maintain this fundraising goal throughout this 3-year period while ensuring financial sustainability.