



# **Strategic Planning 2020-2021**

## **Dream Riders of Kentucky Inc. Executive Summary**

### **History Narrative:**

Eighteen years ago, Dream Riders of Kentucky Inc. began with a shared dream by the founders Suzy Higdon, Mike Clark, Nancee Woodward and Benny Clark to build a therapeutic riding center for people with special needs. Thank you for making the dream come true.

### **Dream Riders of Kentucky Inc. Historic Milestones**

2003 Dream Riders of Kentucky was founded (became an official 501c3 non-profit) by dedicated volunteers (Suzy, Mike, Nancy, Benny,)

2014 Dream Riders moved to its present location to construct their purpose-built facility at 4705 Winkler Rd, Philpot, KY, 42366

2018 Staff structured: Executive Director, Instructor, Barn Manager + increased education, board development and financial stability

2019 Dream Riders became both a CHA and PATH Intl Member Center + increased rider services

2020 Hired a PATH Intl Master Instructor to expand services and become a PATH Intl Premier Accredited Center (Exciting times!)

### **The Dream Riders Dream**

In 2003, both Mike Clark and Suzy Higdon had a dream to benefit the people with disabilities in our community using horses as a therapy tool.

*Mike's Dream:* "I was inspired by the life of my daughter Megan, who died at age 25, and left a legacy of helping people who were disadvantaged in some manner. I began to search for a way to serve our Special Needs population. Megan has a younger sister Erin, who has Down Syndrome, and the seed to serve her and others like her was planted. This seed became the nucleus of a plan that became Dream Riders."

*Suzy's Dream:* "I had owned and ridden horses for many years before my daughter Haley was born with Special Needs. As she grew, I noticed she was developing a bond with our horses. After some research, I discovered that there was an international association devoted to working with disabled individuals utilizing equine therapy. I had witnessed firsthand what riding horses had done for Haley and wanted to create a program here in Daviess County for those with similar needs."

When Mike and Suzy discovered they had similar dreams, the idea of creating Dream Riders was born. They began by inviting a few like-minded people (the same people who later became the Board of Directors) to develop a plan to create a 501C3 non-profit to serve those with disabilities in this and surrounding counties.

To say it was a humble beginning is an understatement. They began serving 10 children per week at various sites around the county. Those early days included borrowing horses and tack, as well as trailering horses to and from each session. Over the next 10 years, the client base grew to over 300 individuals. After much hard work by board members and volunteers, the dream to acquire a permanent home for Dream Riders was realized. A long-term lease and the building of a modern equestrian facility encompass the dreams of the past and positions the organization for growth in the future. With the hiring of trained and competent staff, the door is open to serve populations including Veterans, First Responders, Nursing Home Residents and those dealing with mental health issues.

### **Facilities Description**

Dream Riders' physical address is at 4705 Winkler Road, Philpot, KY, 42366 in Daviess County. Dream Riders is situated on 17 beautiful acres with a permanent purpose-built therapeutic riding facility, climate-controlled classroom, indoor arena, and pastures with run shelters. Large facility improvements include a safe mounting system & effective tack room with appropriate equipment.

## **1. Program Summary**

Dream Riders of Kentucky Inc. is a 501(c)3 non-profit organization located in Philpot, Kentucky that provides therapeutic horseback riding services to persons over the age of four with physical, developmental, cognitive, emotional, and behavioural challenges.

### **Overview of Equine Assisted Activities and Therapies**

Through the broad spectrum of carefully planned equine assisted activities and therapies, individuals of all ages experience physical, cognitive, social and emotional life enhancing benefits. Equine assisted activities include therapeutic riding and horsemanship, interactive vaulting, equine assisted learning, and therapeutic driving. All activities are conducted by a PATH Intl. Certified Instructor in the field of their expertise. Equine Therapies are provided with a licensed therapy professional partnering with a PATH Intl. certified professional related to the therapy being provided.

### **Services presently offered:**

#### **Therapeutic Riding and Horsemanship**

Therapeutic Riding and Horsemanship are activities that include ground and/or mounted experiences. These carefully planned activities are designed for the purpose of contributing positively to the cognitive, physical, emotional and appropriate social behaviors of individuals with special needs.

#### **Equine Assisted Learning**

Equine Assisted Learning provides experiential learning opportunities by incorporating horses in the lessons with the goal of developing life and soft skills. The life skills can be related to academic achievement, appropriate behaviors, personal growth, social interaction and team building. Core values that impact appropriate behaviors such as attentiveness and awareness, resilience and teamwork, communicating effectively, cooperation, making good choices, commitment, respect, empathy for others, kindness, and critical thinking. Each lesson is incorporated into themed equine partnered activities which may be either on the ground or mounted.

### **Presently, Dream Riders of Kentucky Inc. has two PATH Intl Certified Staff**

- 1) (1) PATH Intl Master/CTRI Instructor in therapeutic riding (1) PATH Intl Registered/CTRI Instructor
- 2) (2) Equine Specialists in Mental Health and Learning (ESMHL)
- 3) (1) PATH Intl Certified Therapeutic Carriage Driving Instructor
- 4) (1) PATH Intl Certified Interactive Vaulting Instructor
- 5) (1) PATH Intl Accreditation Site Visitor
- 6) (4) Instructors in Training for PATH Intl therapeutic riding certification

### **Additional program capabilities based on present resources:**

#### **Therapeutic Driving**

Therapeutic Driving is a unique equine activity designed to help people with physical, cognitive, emotional and/or social challenges to address their personal life skills. This program provides participants with the opportunity to groom, harness, hitch and drive. All lessons are conducted with a trained volunteer and a PATH Intl. Certified Driving Instructor. Therapeutic driving provides another unique connection with the horse both on the ground and in the carriage.

#### **Interactive Vaulting**

Interactive vaulting is a therapeutic equine activity in which the participants perform movements on and around the horse as a team. Interactive vaulting fosters teamwork, independence, respect, empathy; builds confidence and encourages positive social interaction in a fun, safe environment with their partner the horse.

## Statistical Analysis of Services

### a) Services provided: days of riding

Total number of annual participants grown from 18 in 2019 to 57 320% increase  
Total number of lessons provided annually 1,128 (scholarship + school + individuals)  
T.R. Classes offered: Tuesday pm, Wednesday am + pm, Thursday am + pm, Saturday am  
Participant # per semester: 2019 = 18 Spring 2020 = 38 Summer = 46 Fall = 57  
Participant hours of service in 2020 = 1,128 hrs. (even with COVID-19)  
School group participants: new program developing  
Revenue generated from participants: 2019 \$2,700 per semester 2020 \$8,550 per semester  
Scholarship expense: \$ 300 to date Scholarship fund: \$1200

### b) Total Horses – 11

2020 = 4 horses retired due to unsoundness or inappropriate behaviours  
2020 = Total herd 11  
2020 = 2 horses on loan from Renew Therapeutic Riding Center (Silk and Nobie)  
2020 = 2 horses on loan from Cumberland Plateau, Tennessee  
2020 = Plans to retire Kentucky and Celebrate his life  
2021 = Bring in 3 new horses who are already assessed for trial period

### c) Staff:

2 Full time: a) Program Director (doing most of the executive director duties)  
b) Stable Manager/Instructor/Assistant to Program Director

### d) Board members - 12

12 board members  
Program Committee – Dr. Wills, Suzy Higdon, Kerry Paape, Hannah Rogers, Nancy Woodward  
Executive Committee – Chair Dr. Wills, Vice Chair Suzy Higdon, Treasurer Johnna Webb, Secretary Molly Gross

### e) Volunteers

87% retention  
January 7 to Dec 16 = 8,526 hours @ \$25.43 = \$216,816.18 (volunteer manpower savings)  
Present active volunteers: 56

## Mission, Tag Line, and Vision Analysis

***Current Dream Riders mission:*** (adopted as written, reflective of services provided)

To provide individuals with physical, cognitive, social and/or emotional needs an opportunity to experience the joy of riding and therapeutic value of horses.

***Dream Riders of Kentucky Tag Line:***

Presently using: Changing Lives One Stride at a Time? (Suggest adding the word dream)

*Tag line: Making Dreams Come True One Stride at a Time*

***Dream Riders of Kentucky Inc. Vision:***

To serve the health and educational needs of Daviess County and surrounding area with valuable, professional equine related activities and therapies.

To be a PATH Intl accredited center, and partner with other organizations and individuals who provide best practices and measurable outcomes for all we serve.

## Strategic Plan Worksheet

### Organizational Mission + Vision (What is Dream Riders of Kentucky Inc.)

To provide individuals with physical, cognitive, social and/or emotional needs an opportunity to experience the joy of riding and therapeutic value of horses.

Does the Mission represent the organization?	Supportive information for Strategic Planning
Participants and purpose of mission: Provision of Equine Activities and Therapies	Physical, Cognitive, Social, Emotion benefits to individuals with special needs.
<b>Present EAA programs:</b> Therapeutic riding Horsemanship Equine Assisted Learning (EAL)	<b>Potential additional programs: (EAAT)</b> Mental health (EFP, EAL) Interactive Vaulting Therapeutic Carriage Driving

### Dream Riders of Kentucky Inc. Values are the culture of our organization

**Suggested values:** Professional + Quality + Innovation + Transparency + Good stewardship + Integrity + Service + Community of Inclusion + Opportunity + Enrichment + Compassion + Kindness

#### Professionalism + Quality + Innovation

- PATH Intl Accredited Centre + Implementing best practices of the industry
- PATH Intl. Certified Instructors to ensure quality of instruction and safety
- Innovative programming, events, and solutions to meet participant needs
- Board members and volunteers are collectively qualified and dedicated to the mission

#### Transparency + Integrity

- Will understand the responsibilities in providing financial information to the public if asked. This information, including our 990, will be posted and available to the public.
- Actions and updates of the organization will be shared in a monthly newsletter

#### Good Stewardship + Service

- Board governance and active participation in fundraising
- Reliance on and appreciation of volunteered service to our programs

#### Community of Inclusion + Opportunity + Enrichment

- Provide a welcoming, inclusive community with opportunities for enrichment for everyone
- Encouraging participants, their families and volunteers to reach their potential through opportunities provided

## Strengths, Weakness, Opportunities, Threats (S.W.O.T.) Analysis

Facts and S.W.O.T Summary	Supportive Information for Strategic Plan
<p><b>Need for growth &amp; sustainability</b> 3<sup>rd</sup> party community assessment</p> <p><b>Owensboro Community Health Assessment Results 2018-2021</b></p>	<p style="text-align: center;"><b>Owensboro Community Health Needs Assessment Results 2018-2021</b></p> <p>Daviess County needs programs to address the following, ranked in priority:                      #1 Heathy behaviors - poor eating habits, access to healthy foods, lack of exercise                      #2 Obesity and obesity related diseases                      #3 Mental health including: depression, counselling and testing for mental health disorders                      #4 Substance abuse including: prescription, illegal and illicit substances                      #5 Tobacco use and smoking</p>
Economic objectives	<p>Longevity and sustainability                      Budget development based on actuals of previous year, while aligning with the strategic plan and needs                      Grow an endowment                      No rider will ever be turned away due to lack of funds</p>
Dream Riders of Kentucky Strengths	<p>Longevity since 2003 (18 years)                      320% Increase in participants                      57 participants                      Dedicated board, staff &amp; volunteers                      PATH Intl Certified Instructors                      Excellent location with long-term lease (30 years)                      Established facility including barn, arena(s), pastures                      Collaborative, supportive generous partners in community                      Communication capabilities: phone + internet                      Impact 100 grant awarded in 2020                      Sandy's qualifications/certifications/experience</p>
Dream Riders of Kentucky Inc. Weakness	<p>Board development &amp; education needed                      Need for a succession plan                      Present herd needs further training                      Small volunteer core carrying the load                      Need to expand electronic outreach                      Need to expand donor base                      Need a functional office to be effective                      Limited virtual capabilities (education and programs)</p>
Dream Riders of Kentucky Opportunities	<p>Provide the community with much-needed services                      Staff development                      Increase diversity of programing                      Increased educational partnerships &amp; internships                      Increase scholarship opportunities                      Increase funding through community partnerships                      PATH Intl Premier Accredited Center                      Create a succession plan for board and staff</p>
Dream Riders of Kentucky Threats	<p>Staff and volunteer retention                      COVID-19 uncertainty                      Weather conditions                      Aging herd                      Lack of funding for expansion                      Financial dependency on small pool of donors</p>

## Suggested Goals (2020 –2021) 1-year plan

### **Goal 1: Update mission, vision statements and include values**

- Objective 1: Review mission and vision discuss validity for present program Nov. 1, 2020
- Objective 3: Board vote on mission and vision December 7, 2020
- Objective 4: Discuss, agree and vote on organization values. December 7, 2020
- Objective 5: Board vote on Dream Riders Core Values December 7, 2020
- Objective 6: Board vote on Dream Riders Tag Line December 7, 2020
- Objective 3: Send mission to IRS with the annual 990

### **Goal 2: Board development**

- Objective 1: Develop working committees with job descriptions
- Objective 2: Update board job descriptions completed and voted upon
- Objective 3: Develop new board member orientation and training
- Objective 4: Board manual updated and voted upon
- Objective 5: Search and cultivate new board members
- Objective 6: Vote in new board members
- Objective 7: Develop board succession plan

### **Goal 3: Volunteers strategic plan (retention, recruitment, training plan)**

- Objective 1: Expand recruitment methods
  - a) Expansion of Social media outreach, Facebook, Instagram
  - b) Update all information with volunteer organizations in Daviess County
  - c) Book speaking/zoom engagements to include at least 5 organizations for 2021
- Objective 2: Expand methods of recruiting, training, and retaining volunteers

### **Goal 4: Expansion of programs at present facility**

- Objective 1: Add Equine Facilitated Mental Health Program (E.F.P + E.A.L)
- Objective 2: Add Interactive Vaulting Pilot Project
- Objective 3: Add Therapeutic Driving Pilot Project

### **Goal 5 Herd development (Capacity of 120)**

- Objective 1
  - a) Assess all horses, hours, weight limits, soundness, tack fit
  - b) Update all horses individual written training plans
  - c) Develop a schooling team with each horse having their own assigned volunteer
  - d) All horses must be capable of carrying capacity based on 20% of their weight

### **Goal 6 Financial stability**

- Objective 1: Expand donor base 20%
  - a) All board members bring 5 new contact and their information
  - b) Distribute the mailing list to board members and staff, identify known contacts, and obtain email addresses and phone numbers
  - c) Develop a virtual fundraiser (Giving Tuesday)
  - d) Contact all donors with an educational update 2x a year
  - e) Update donors contact information to include email, phone and address
- Objective 2: Increased grant writing opportunities (5 new grant opportunities)
  - a) Identify 10 new possible grant opportunities that align with Dream Riders mission
  - b) Cultivate 5 new grantor relationships with an invitation to apply
  - c) Apply to 5 new additional grants by
- Objective 3: a) Increase revenue through programming that generates services
- Objective 4: a) Increase members of the fundraising committee

**Goal 7 Facility upgrade – assess repairs**

- Objective 1: Expand and Prioritize wish list
- Objective 2: Insulate the arena and build a meeting room for therapeutic interventions – Dec. 2020
- Objective 4: Get 2-3 quotes for every major repair or improvements
- Objective 5: Obtain gift in kind, donors and grantors who will support capital funding

**Goal 8 Dream Riders will serve a year-round program**

- Objective 1: Outreach to typical riders and riders with mild disabilities to continue services year round
- Objective 2: Confirm present volunteers and recruit new volunteers for the winter months
- Objective 3: Develop semester system and annual calendar to include January through December 2021
- Objective 4: Develop pilot programs for the winter climate

**Goal 9 PATH Intl Accreditation obtained**

- Objective 1: Update PATH Intl. membership
- Objective 2: Complete all policies and procedures as outlined in the PATH Intl. manual
- Objective 3: Submit Accreditation application January 2021
- Objective 4: Conduct a mock site visit January 2021
- Objective 5: PATH Intl site visit

**Goal 10. Develop a staff and board succession plan**

- Objective 1: Develop an Instructor Training Program (Virtual and In-house)
- Objective 2: Successfully certify 2-3 PATH Intl. Instructors for Dream Riders
- Objective 3: Mentor present staff and volunteers

**Suggested 1-3 Year Goals (2021-2024)**

1. Financial stability
2. Longevity – review lease and ensure its validity going forward
3. Dream Riders at capacity – 130 participants
4. Facility upgrades and repairs: Refer to priorities on the wish list and needs
5. Volunteer strategic plan implemented and fully functioning
6. Vocational training center
7. Educational training center
8. Expand Staff to include a volunteer coordinator
9. 20-year anniversary Fundraising and Recognition Gala