



Strategic
Plan
2020 - 2025

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Executive Summary

Established in 2014, Horses & Heroes, Inc together with BOLD Horse Solutions offer trauma-recovery with the use of Equine Assisted Therapy. We specialize in trauma that has affected the brain, body, emotions, and behaviors including PTSD to our Nation's Veterans, Active Military, First Responders, their spouses, and children. Horses & Heroes (also known as H&H) along with its subsidiary, BOLD Horse Solutions, offer an integrative approach to growing through trauma. Childhood trauma affects a large percentage of the population and is linked to adult-onset of chronic disease, as well as depression, suicide, violence and becoming a victim of violence. Unlike any other program, we incorporate emotional, physical, and spiritual growth under one roof, addressing growth and recovery from trauma from the cellular level.



Message From Our Founder

We've seen the headlines, heard the stories or understand from our own experiences, traumatic experiences can change lives. As a nation, we know that our service members, our first responders and emergency medical teams, and their families face unique challenges. Physical trauma that results in broken bodies, missing limbs, and prosthetic devices are visible signs of the evidence of trauma. However, not all wounds are visible and not all causes of trauma are the direct result of combat or one traumatic event.

Horses & Heroes together with its subsidiary, Bold Horse Solutions seeks to transform how we approach growth and healing from the invisible wounds of trauma. This plan outlines the purpose, strategic plan and goals we seek to attain over the next five years. By attaining these goals, building the trauma retreat center, and integrating various modalities of healing, we strive to improve the qualities of life for our clients, reduce symptoms associated with chronic stress and provide the space and programs for natural, true healing to transform lives, relationships and communities.

My personal and the mission of H &H is to provide the highest quality equine-assisted therapy to our Nation's Veterans, Active Military, First Responders and their families.

Sincerely,

Julie Baker



BOARD OF DIRECTORS

JULIE BAKER PRESIDENT/ EXECUTIVE DIRECTOR	LISA BODENHAUSEN VICE PRESIDENT	AMBER ESHELMAN SECRETARY
ALEX MCENTIRE MENTAL HEALTH ADVISOR	TREASURER/CFO OPEN POSITION	LEGAL COUNSEL OPEN POSITION
DEVELOPMENT OPEN POSITION	MARKETING OPEN POSITION	NONPROFIT GOVERNANCE OPEN
POLICE OPEN POSITION	FIRE OPEN POSITION	MILITARY OPEN POSITION
PROGRAMMING OPEN POSITION	BOLD HORSE OPEN POSITION	BOLD HORSE OPEN POSITION

Mission and Vision



Mission Statement

Our mission is to provide the highest quality equine-assisted therapy to our Nation's Veterans, Active Military, First Responders and their families.

Vision Statement

Horses & Heroes will be the premier equine-assisted psychotherapy retreat center in the Midwest; by providing emotional, physical and behavioral therapy programs that will benefit our Nation's Military, First Responders, and their families.





We Serve Those Who Serve Us

Horses & Heroes provides EAGALA Psychotherapy to our Nation's Veterans, Active Military, First Responders and their families.

Licensed practitioners, certified coaches, and qualified staff offer brain, body, emotional and behavior therapy including PTSD.



Services provided include:

- Brain neurofeedback
- EMDR
- Pulsed Electromagnetic Field (PEMF)
- Somatic Touch
- Therapeutic Massage
- Cognitive Counseling
- Equine Assisted Therapy
- Nutrition
- Exercise & Movement



The BIG 5 Plan

1. Property Acquisition
2. Program Development
3. Financial Stability
4. Marketing/Development
5. Community Engagement



Specific short term (0 to 5 years), mid-term (5 to 10 years), and long term (10+ years) action items have been developed to implement this plan.

The proposed mid-term and long-term actions can be expected to be modified as conditions change, and new circumstances not anticipated by the Vision are addressed. All these ideas, strategies, and action items should be considered in order to fully implement this strategic plan.

All time, cost, and project involvement has been estimated. Such estimates are predicated on budgets and permits. Finally, since many of these strategies and action items are programmatic and require careful coordination by the Horses & Heroes Board and strategic planning committee, these strategies are the opinion of the board and third-party consulting firm Joint Effort Business and Marketing Consultants.

1. Property Acquisition

Strategies

- Locate land to purchase within Kansas or Missouri
- Identify property investors
- Partner with local and national organizations
- Strategic location expansion

Short-Term Plan (0-5 years)

Project	Description
Launch investor partnership(s) to acquire land	Executive Director will be responsible for spearheading this initiative.
Offer corporate name recognition on property	Once partnership is determined, each investor over a determined amount will have a property building named after their company.
Expand boarding services to horse owners	Boarding horses is an additional revenue source and would have a dedicated caretaker(s).
Offer additional services and programs at main service location	There are several other services that could be offered on the H&H campus. These services would be focused on therapeutic and holistic programs.

Mid-Term Plan (5-10 years)

Project	Description
Acquire an additional location to expand services within Kansas and Missouri	There are major markets in the Kansas/Missouri area that would benefit from our services. Consider expanding services to those locations.
Segment our therapy services based on location	Expanding where we offer services based upon location. This will increase service visibility and reduce schedule conflicts.

Long-Term Plan (10 + years)

Project	Description
Expand services in multiple cities	Strategically identify expansion cities. Offer services in cities with a high military presence.

2. Program Development Strategies

- Increase the number of therapy classes offered
- Diversify the types of therapies offered
- Increase staff and contractors
- Attend Conferences
- Partner with like facilities to increase impact

Short-Term Plan (0-5 years)

Project	Description
Customer retention survey	Customer surveys should be offered to each participant to ensure effectiveness of services.
Increase contractors and staff	Measure the need for new staff and contractors based upon the prominent variables: Increase advertising and program development.
Attend conferences	Subsidise fees for contractors and staff to attend conferences. Ensure that contractors and staff are up to date with CEU and trending services.
BOLD Horse Solutions	Increase advertisement and program exposure.
Fee based services	Identify other fee based services that could be offered on H&H campus.

Project	Description
Expand target demographic	Offer free services to children whose parents are active military or first responders and/or children with IDD.
Standardized programs and operating procedures	Focus on 12 week programs and measure outcomes to identify effectiveness. Ensure client retention post program.
Program recruitment	Create a partnership with the various first responders and military personnel to recruit.

Mid-Term Plan (5-10 years)

Project	Description
Expand the service base	Ensure that therapeutic services are beneficial to the client.
Insurance Billing	Offer insurance and Medicaid billing for EAGALA.

Long-Term Plan (10 + years)

Project	Description
H&H presence in various markets	Increase the locations presence to include target markets.

3. Financial Stability

Strategies

- Create strategic fundraising efforts
- Increase advertising of BOLD Horse services (fee based)
- Create financial partnerships with corporate companies
- Purchase Grant Sourcing Software

Short-Term Plan (0-5 years)

Project	Description
Grant Software	Apply for a grant to purchase the grant sourcing software. This will increase the access
Financial Partnerships	Seek large corporations to sponsor the following: <ul style="list-style-type: none"> - Location(s) - Programs - Horse Daily and Medical - Future Growth
BOLD Horse	Increase service visibility. Offer services to adults and children with IDD. These services are in high demand and insurance billed.
Offer Insurance Billing	Identify insurance companies that offer EAGALA Therapy and apply for billing to increase payment options.

Project	Description
Strategic Fundraising	Please see attached section for fundraising forecast.
Volunteers	Increase volunteer programs to elevate paid positions.

Mid-Term Plan (5-10 years)

Project	Description
Hippotherapy Services	Expand services to include Hippotherapy to children.
Expand service locations	Increase service locations to include a dedicated campus for BOLD Horse.

Long-Term Plan (10 + years)

Project	Description
H&H National	Identify locations nationally that could benefit from the services that you offer and increase your locations.

4. Marketing/Development Strategies

- Increase advertising of the services we offer and those we serve
- Hire a contracted or full-time development coordinator
- Implement marketing plan
- Purchase grant sourcing software
- Create online donation initiatives

Short-Term Plan (0-5 years)

Project	Description
Identify buyer persona	Once we have identified our buyer persona we will be able to know exactly how to communicate with our desired audience.
Grant Sourcing Software	Purchasing grant sourcing software will ensure that we have consistent access to grant funding. Software will generate immediate income.
Refine the marketing plan	The marketing plan offers a plan for the next 3 years, however, the plan will need to be refined every year to ensure accuracy.
Media Relations	Using the media to advertise our services, those we serve and our effectiveness.

Con't Short Term Plan

Project	Description
Online Donations and newsletter	Create a strategic online giving campaign. Increase recurring donations, program awareness and volunteer opportunities.
Increase social media presence	Increase engagement, questions, polls and pictures on all platforms.

Mid-Term Plan (5-10 years)

Project	Description
Retain a full-time development coordinator	The development coordinator would be responsible for fundraising, planning the 10 year anniversary event, press, grant writing and media communication.
Revise marketing plan	Every 5 Years H&H should update their logo, web presence, and revise/update marketing plan.

Long-Term Plan (10 + years)

Project	Description
Development	With national partnerships develop multiple therapy locations.

5. Strategic Partnership / Community Engagement

Strategies

- Create community partnership(s)
- Presenting and speaking engagements
- Partner with like agencies to increase visibility
- Corporate Partnerships

Short-Term Plan (0-5 years)

Project	Description
Community Partnership(s)	Building partnerships with companies to increase volunteers.
Increase Community Involvement	Seek speaking opportunities in the community to increase program awareness.
In-Kind Partnership(s)	Identify possible in-kind partnerships to donate needed supplies on campus.
Strategic Financial Partnerships	Create partnerships with large organizations in KS. Ask those partners to fund the following: <ul style="list-style-type: none"> • Location(s) • Horses • Feeding • Caretaker
Board Development	Offer corporate sponsors a seat on the executive board.

Mid-Term Plan (5-10 years)

Project	Description
Principal Sponsor	Create a partnership that will be the principal sponsor for all our events for a 5 year term.
Community/Corporate Volunteer Program	Increase the community and corporate volunteer program. Goal is to increase community awareness and corporate partnerships

Long-Term Plan (10 + years)

Project	Description
Identify a national partner	Nationally recognized partnership that offers H&H the ability to increase their national presence and increase strategic partnerships with other EAGALA providers.



SWOT Analysis for Fundraising

Strengths & Weaknesses

Strengths

Leadership
The Need and Willingness to Give
Work Ethic
Connections
Committed to Mission
Solid Community
Great Ideas
Vets are High Interest
Diverse Volunteers

Weaknesses

Lack of Resources
Sponsors
People
Promo and Marketing
Documentation
Focused Verbiage
Lack of Annual Planning

Opportunities & Threats

Opportunities

Corporations Sponsors
Annual Fundraising Gala
Tours of Location
Renting Community Room
Speaking Opportunities
Silent Online Auction
Online Store - Bonfire.com
Monthly Memberships
Being an Expert within the Media
Building Partnerships - Suicide
American Royal Partnerships

Con't of Opportunities

Partnering with other/like Equines
Mini Day Events
Sponsor a Horse
Horse Emergency Planning Day
Partnering with Companies outside of demographic
Blogging

Threats

Grants -Miss reporting
Financial Gaps
Women Employment Network (WEN)



SWOT Analysis for the Company

Strengths & Weaknesses

Strengths

Serve our Nation's Military
Rescue Horses
Funding In the Field
Board Dedication
Authentic
Mental Health Provider
Work history with private/gov
Faith Base

Weaknesses

Fundraising
Grants and Development
Staff
Location
Limited indepth Non profit exposure
Time

Opportunities & Threats

Opportunities

Prevent deaths and unnecessary trauma
Connection with underserved population
Give people hope
Offer healing to families
Legal Advocate
Growing therapeutic Services
For profit services
Grants
Volunteers
Expansion
Investors
New program/new people

Threats

Difficult to engage population
Understanding what H&H actually offers
Not reaching people who can help financially
Lack of resources
Lack of staff/paid
Location
Stable Executive Board
Unknown time lines
Over reaching financially
Weather



S.M.A.R.T Goals

1. During the winter months using this time to advertise. Visit the VA, FA, IAW, Local Factories, Churches.
2. Create paid employee positions within the next 3 -5 months to expand volunteers, development and marketing.
3. Make the website work harder - volunteer applications, blogging, personal stories of success by January 2020.
4. Launch large marketing Campaign for private investors, corporate investors, donations within the next 6 weeks.
5. Utilize CRM software to send out monthly newsletter to contacts.
6. Video Advertising within Market plan for each section.
7. Project Management all in one place (Newsletter).
8. Online store to sell H&H items; increase sales and indirect funding.
9. Develop and engage our Board, identifying key players.
10. Make our programs top notch in quality over competitors, attracting business by word of mouth over others.
11. Train and certify mini's and develop the program reaching out to every agency we can; schools, social workers, court, police, Emt's, fire dept, P&P, foster care, trainings, etc.
12. Develop a place for mental health providers to come and recharge.
13. Make the Veterans/Volunteer program bigger and more defined.
14. Identify and secure location by Spring 2020.
15. Develop Nikao's Journey and initiate program pilot by Spring 2020 - Pricing, Demographic and Program Outline.
16. Hire first P/T employers. Create job descriptions and implement payroll services by December 2019.
17. Implement CRM System that is HIPPA compliant by Dec 2019 - user friendly and systemize communications, sales, leads, opportunities.

Suggested Fundraising Forecast

Annual Events:

- **December -January**
 - Winter online fundraiser - requesting recurring donations
- **March - June**
 - Grant Season
- **April**
 - Spring online fundraiser - requesting recurring donations
- **July**
 - Adopt a Mini Horse
- **August**
 - Anniversary Fundraiser - Support our Mission
- **October**
 - Adopt A Horse
- **November**
 - Giving Tuesday

Grants

Apply for multiple grants throughout the year with a focus on receiving funding in the following areas:

- Operational/Technical
- Programming
- Horses/Rescue



