McCormick Research Institute Strategic Plan

Vision
Reduce suicide rates among Veterans and strengthen families who include an individual with special needs by expanding access to effective equine-assisted therapies worldwide.

The organization works towards this goal while delivering the highest quality of equine-assisted therapies locally, conducting research in partnership with local hospitals and universities, and disseminating knowledge to industry practitioners and investors.

Mission
Serving individuals with special needs and Veterans struggling with PTSD in programs known respectively as Heavenly Hooves and Horses & Heroes.
McCormick Research Institute

Home of Heavenly Hooves
and Horses & Heroes

2018
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Plan Snapshot</td>
<td>4</td>
</tr>
<tr>
<td>Vision &amp; Growth Initiatives</td>
<td>5</td>
</tr>
<tr>
<td>Governance</td>
<td>6</td>
</tr>
<tr>
<td>Staff</td>
<td>7</td>
</tr>
<tr>
<td>Fundraising &amp; Financial Resources</td>
<td>8</td>
</tr>
<tr>
<td>Communications &amp; Information Technology</td>
<td>9</td>
</tr>
<tr>
<td>Systems &amp; Accounting</td>
<td>10</td>
</tr>
<tr>
<td>Tools</td>
<td>11</td>
</tr>
<tr>
<td>Transparency</td>
<td>12</td>
</tr>
<tr>
<td>Results-Focused Management</td>
<td>13</td>
</tr>
<tr>
<td>Program Services</td>
<td>14</td>
</tr>
<tr>
<td>Program Descriptions</td>
<td>15</td>
</tr>
<tr>
<td>Departmental Chart &amp; Growth Initiatives Illustration</td>
<td>16</td>
</tr>
</tbody>
</table>
**Our Mission**
The McCormick Research Institute serves individuals with special needs and Veterans struggling with PTSD in programs known respectively as Heavenly Hooves and Heroes.

**Our Vision**
McCormick aims to reduce suicide rates among Veterans and strengthen families who include an individual with special needs by expanding access to effective equine-assisted therapies worldwide.

**Our Values**
Gratitude  
Integrity  
Excellence  
Collaboration  
Character Development  
Innovation & Research  
Community & Connection  
Integrity & Accountability  
Belief in the Grace, Hope, Purpose and Power Available Through Relationship with God

---

**Strategic Plan Snapshot**

| KRA’s Key Result Areas | CSF’s Goals – Critical Success Factors | STRATEGIES 2 Years (2018-2019) | ACTIONS & MEASUREMENTS 2018 | OWNERS/
|------------------------|---------------------------------------|--------------------------------|-----------------------------|---------
| Vision & Growth Initiatives | Growth of programs at a pace that enables the organization to become sustainable and achieve its vision | • Strengthen relationships with VA, policy makers, funders, industry partners  
• Build scalable programs & sustainable revenue streams | • Complete H & H and corporate workshop curriculums  
• Strengthen relationships with VA contacts  
• Identify ways to get paid for Veterans counseling  
• Establish Finance & Funding Dev Committee and Strategy Committee  
• Identity $58 VA employee on research team  
• Secure funding grant for 2019 | Thomasa
| Governance | Knowledgeable and engaged Board of Directors helping move the organization forward | • Engage Board members  
• Ensure familiarity with M/V/S Plan  
• Significant stewardship of BMHCs  
• Attract appropriate Board members | • Create and teach Board members “elevator speech” w/100% knowing spiel  
• Steward 4 active committee chairs who meet 4x/sr minimum  
• Four committees active w/4 meetings min w/goals & comm. rpts @ each Board meet | Thomasa
| Staff | Enough staff with the right skills & right attitude in the right position | • Recruit and develop right talent  
• Balance workloads  
• Encourage prof. development  
• Leadership actively mentors staff | • Identify, plan, add to team to support growth: local stewardship, #’s, Marketing  
• Board level leadership mentoring—Leadership Dev. Plan development  
• Staff level leadership mentoring—Leadership Dev. Plan development  
• Staff accountability—quarterly review of Strategic Plan | Thomasa
| Staff | Adequate financial resources to move strategic plan forward at a healthy pace | • Diversity fundraising strategies  
• Strengthen donor trust and partnership  
• Clearly convey investable opportunities  
• Evaluate UBI opportunities  
• Increase economies of scale | • Submit 7 grants in 2018  
• Mail thank you’s within 10 working days of receiving every gift  
• Book & deliver 20 PR visits, identify & develop new revenue streams, creates fundraising plan  
• Maintain and publish current list of needs and with attached value/cost  
• Events Comm hosts Derby Party  
• Finance & Fund Dev Cmmn present funding plan | Stra Plan Comm
| Staff | Mission, vision, values, brand, IT essence conveyed in a way that is well-defined, appealing, and time | • Provide appealing, clear messaging showcasing niche credibility  
• Expert internal M/V/S Plan knowledge  
• Useful IT, public relations/social media in order to be relevant and connected | • Website is current, has downloadable online forms, easy online pay, and registration  
• Engage volunteers & participants to sign up online  
• All tv screens projecting information continuously  
• Create sophisticated PR packet and collateral materials  
• National Affairs Comm. presents prospect & relationship list  
• Local Affairs Comm. presents prospect & relationship list | Kelli
| Staff | Mission, vision, values, brand, IT essence conveyed in a way that is well-defined, appealing, and time | • Provide appealing, clear messaging showcasing niche credibility  
• Expert internal M/V/S Plan knowledge  
• Useful IT, public relations/social media in order to be relevant and connected | • Website is current, has downloadable online forms, easy online pay, and registration  
• Engage volunteers & participants to sign up online  
• All tv screens projecting information continuously  
• Create sophisticated PR packet and collateral materials  
• National Affairs Comm. presents prospect & relationship list  
• Local Affairs Comm. presents prospect & relationship list | Kelli
| Communications & Information Technology | Up to date, accurate, scalable systems providing order, accessibility, & efficiency | • Standardize and organize forms, records, & processes  
• Provide real-time data  
• Design scalable systems | • Hold staff accountable for assigned records & purging with annual August audit  
• P & L and AR reviewed and corrected for errors within 1 week of each Qtr close  
• Manage accounting so that real-time data is available & accurate  
• Send Paid Days January, February, June & July  
• Generate “No Service” letters & list 3/31 & 8/31, review AR/write off bad debt & w/o by 12/31 | Kelli
| Technology | Ample tools to conduct mission and scale operations towards vision in a safe, professional, efficient manner | • Increase capacity  
• Understand equipment and horse needs and manage to meet needs | • Wish list up to date and open to public  
• Seek funding for fixed asset  
• Get funding to build space for training rooms | Kelli
| Staff | Full disclosure & accountability to maintain trust, guide donors, & encourage charitable giving | • Have highest industry endorsements  
• Provide current organizational information in public domain  
• Provide current organizational information to Board, donors and staff | • Update and publish annual report & portrait (2 places) by 1/15 annually  
• Provide Board and staff with final annual report & strategic plan within 1st quarter  
• Initiate annual audit by 6/30  
• Initiate annual 900 by 6/1 | Kelli
| Staff | Management that governs and develops results-based programs that are effective, efficient, and create measurable impact | • Results are regularly tracked, evaluated & reported in light of targeted outcomes  
• Solid grasp of opportunities/challenges addressed with a strategic plan  
• Reflective learning to address mistakes | • Record participation numbers in all activity  
• Adjust Strategic Plan initiatives according to prior year measurements & results | Marcy/Caity
| Program Services | Program services offered at the right price in the right way to achieve the right impact | • Offer services at the right price  
• Bill and collect on time  
• Deliver impactful services  
• Increase (internal) community engagement | • Summer Camp Book Completed by 6/1  
• Facilitate client interviews/surveys to access impact  
• Increase FB friends by 100%–invite all vols, participants, Board, donors | Marcy
| Program Services | Program services offered at the right price in the right way to achieve the right impact | • Offer services at the right price  
• Bill and collect on time  
• Deliver impactful services  
• Increase (internal) community engagement | • Summer Camp Book Completed by 6/1  
• Facilitate client interviews/surveys to access impact  
• Increase FB friends by 100%–invite all vols, participants, Board, donors | Marcy
Vision and Growth Initiatives

Growth of programs at a pace that enables the organization to become sustainable & achieve its vision

**Strategies**

Strengthen relationships with VA, policy makers, researchers, funders, industry leaders

Build scalable programs & sustainable revenue streams

**Actions – Measures - Owner/s**

**2018 Tasks**

- Complete H & H curriculum
- Strengthen relationships with VA contacts
- Identify ways to get paid for Veterans counseling
- Complete corporate workshop curriculum
- Establish Finance & Funding Development Committee—meets min of 4 times/year
- Establish Strategy Committee—meets minimum of 4 times/year
- Identify a 5/8 VA employee on research team
- Secure funding/grant for 2019

Owners:
- Thomasa
- Thomasa/Eric
- Thomasa/Joanne
- Thomasa
- Thomasa
- Thomasa
- Thomasa
- Thomasa
Governance

Knowledgeable and engaged Board of Directors helping move the organization forward

Strategies

Add Board members who are connected, have specialized knowledge, & financially contribute.
Significant stewardship of all members
Ensure familiarity with M/V/SP
Engage Board members

Actions, Measures, Owner/s

2018 Tasks
☐ Create and teach Board member “elevator speech” with 100% knowing spiel
☐ Steward four active committee chairs who meet 4x/year minimum
☐ Four committees are active w/4 meetings min w/goals & committee reports at each Board meeting

Thomasa
Executive staff
Executive staff
Staff

*Enough staff with the right skills & right attitude in the right position*

**Strategies**

- Leadership actively mentors staff
- Recruit and develop right talent
- Encourage prof. development
- Balance workloads

**Actions, Measures, Owner/s**

**2018 Tasks**

- Identify, add, plan, and/or redesign executive team to support growth  
  Strategic Plan Comm.
- Board level leadership mentoring—Leadership Development Plan development  
  Thomasa
- Staff level leadership mentoring—Leadership Development Plan development  
  Kelli
- Staff Accountability—quarterly review of Strategic Plan  
  Kelli
Fundraising & Financial Resources

Adequate financial resources to move strategic plan forward at a healthy pace

**Strategies**

- Clearly convey investible opportunities
- Strengthen donor trust and partnership
- Diversify fundraising strategies
- Evaluate UBI opportunities
- Increase economies of scale

**Actions, Measures, Owner/s**

**2018 Tasks**

- Submit 7 grants in 2018 (Morse, Jarrard, USAA, Osc. Cty, SCCC, Duke, new partners)  
  - Kelli
- Mail thank yous within 10 working days of receiving every gift  
  - Beth
- Book & Deliver 20 PR visits with (workplace giving, L & Learns, Rotary)  
  - New staff
- Maintain and publish list of needs and with attached value/cost  
  - Kelli
- Approach VA Vendors for donations  
  - New staff
- Engage with ranching families for donations  
  - New staff
- Meet Neil Euliano (Veterans Enthusiast)  
  - New staff
- Create prospecting/fundraising plan  
  - New staff
- Increase number of org./groups hosting events for us  
  - New staff
- Events Committee hosts (conceptualizes, plans, and executes fully) Derby Party  
  - Wendi Jeannin
- Finance & Fund Development Committee presents funding plan  
  - Fin/Fund Dev. Comm
**Communications & IT**

*Mission, vision, values, brand, IT essence conveyed in a way that is well-defined, appealing, timely providing order, accessibility, & efficiency*

**Strategies**

Active public relations & social media in order to be relevant and connected

Provide appealing, clear messaging showcasing niche and credibility

Expert internal M/V/SP knowledge

Employ user-friendly IT systems

**Actions, Measures, Owner/s**

**2018 Tasks**

- Website has forms that are both downloadable & able to be completed online  
  - Kelli
- Website has easy and operable way to pay/give online & register for events  
  - Kelli
- Dynamic items on the page always current, no greater than 1 week delay with changes. Includes:  
  - Updated research page  
  - Sponsors page (with logos)  
  - Wish list  
  - Class schedules  
  - Calendars  
  - Updated research publications  
  - Photo/video galleries  
  - Volunteer handbook  
  - Annual report  
  - Strategic plan  
- Engage volunteers & participants to sign up online  
  - Amy
- All tv screens projecting information continuously  
  - Kelli
- Create sophisticated PR packet and collateral material that clearly conveys mission, vision, values, programs, brand essence, needs, transparency  
  - Kelli
- National Affairs Committee present prospect & relationship list  
  - Natl. Affairs Comm.
- Local Affairs Committee present prospect & relationship list  
  - Local Affairs Comm.
Systems & Accounting
Up-to-date, accurate, scalable systems

Strategies
Standardize and organize forms, records, & processes
Design scalable systems
Provide real-time data

Actions, Measures, Owner/s

2018 Tasks
- Hold staff accountable for assigned records & purging with annual August audit
- Manage accounting so that real-time data is available & accurate
- P & L and A/R reviewed and corrected for errors within 1 week of each 1/4 close
- Send Past Dues January, February, June & July
- Generate “No Service” letters & list March 31st & August 31st
- Review A/R and write off anticipated bad debt by December 31st
- Financial data easily generated for grant applications, reports, and analysis
- Cost allocation reviewed and up to date on all “products”
Tools
Ample tools to conduct mission, and scale operations towards vision in a safe, professional, efficient manner

Strategies
Understand equipment and horse needs and manage to meet needs
Increase capacity

Actions, Measures, Owner/s

2018 Tasks
☐ Wish list up to date and open to public  Kelli
☐ Seek funding for fixed asset needs  Thomasa
☐ Get funding to build space for training rooms  Thomasa
Transparency

Full disclosure & accountability to maintain trust, guide donors, & encourage charitable giving

Strategies

Provide current organizational information to Board, donors and staff
Provide current organizational information in public domain
Have highest industry endorsements

Actions, Measures, Owner/s

Tasks
- Update and publish annual report & portrait (2 places) by 1/15 annually
- Provide Board and staff with final annual report and strategic plan within 1st quarter
- Initiate annual audit by 4/1
- Initiate annual 990 by 6/1

Kelli
Kelli
Thomasa
Thomasa
Results-Focused Management

Management that governs and develops results-based programs that are effective, efficient, and create measureable impact

Strategies

Results are regularly tracked, evaluated & reported in light of targeted outcomes
Solid grasp of opportunities/challenges addressed with a strategic plan
Reflective learning to address mistakes

Actions, Measures, Owner/s

Tasks

☑ Record participation numbers in all activities
☑ Adjust Strategic Plan initiatives according to prior year measurements & results

Marcy/Caity
Kelli
Program Services

Programs offered at the right price in the right way to achieve the right impact

Strategies

Increase (internal) community engagement
Offer services at the right price
Deliver impactful services
Bill and collect on time

Actions, Measures, Owner/s

2018 Tasks
☐ Summer Camp Book Completed by 6/1 Marcy
☐ Facilitate client interviews/surveys to access impact Kelli
☐ Increase FB friends by 100% - Invite all vol, participants, staff, Board, donors to FB Kelli
Program Descriptions

Heavenly Hooves

**Recreational Activities**
Participants can enjoy therapeutic riding activities and ground-based activities! Therapeutic riding instruction is provided by a certified therapeutic riding instructor and is designed to improve balance, coordination, communication, focus, flexibility, and muscular strength.

**Therapeutic Services**
Participants who have been prescribed occupational, physical, speech, mental health treatments enjoy the experience with their health professional and the help of a horse! Clients engage in mounted therapies as well as conventional treatment methods. Chaplain services available as well.

Horses & Heroes

**Recreational Activities**
Horses help Veterans reconnect in a foreign world and rediscover a sense of purpose. A certified therapeutic riding instructor facilitates group sessions that include both mounted activities and ground work.

The Horses & Heroes Drill team showcases Veterans at various rodeos and events. Veterans who have completed extensive riding instruction and ten Group Counseling Workshops can apply to join the Drill Team.

**Therapeutic Services**
Group and individual counseling sessions are available to Veterans diagnosed with PTSD. A licensed mental health professional utilizes horses as a therapeutic tool to support the clients goals. Participants engage in both groundwork and mounted activities. Program activities are designed to improve mental health and foster successful relationships in a civilian society. Chaplain services available as well.

Research

The McCormick Research Institute is driven by a theory of change. Traditional treatments often come in the form of a pill, but a powerful remedy promises a cure that can be found upon four legs. In partnership with the University of Central Florida College of Medicine, evidence-based research is conducted with the goal of producing research, identifying best practices, and designing the most impactful treatments for Veterans struggling with PTSD and individuals with autism.

**Autism and Equine-Assisted Therapies**
Medication is sometimes prescribed for people with Autism, but mostly to control symptoms like hyperactivity and seizures. While there is no known cure for this disorder, researchers suspect that equine-assisted therapies may be a highly beneficial treatment programs for individuals with autism. A horse’s fuzzy muzzle stimulates the tactile senses and the rhythmic movement of a horse inspires a rider to focus and improve motor skills. Horses engage social interaction, calm and soothe timid individuals, and inspire children to make eye contact, perhaps for the very first time.

**Veterans and Equine-Assisted Therapies**
The suicidal rates among Veterans are a loud cry for more effective treatments for those who served our nation. Promising equine-assisted therapies are studied in an effort to identify practices that may help Veterans rediscover hope and reintegrate into civilian living.

Education

**Education**
Educational offerings include communication and bedside skills for UCF College of Medicine students, UCF cross-disciplinary classes, continuing education for industry and health professionals, and corporate retreats.