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Introduction

McCormick Research Institute is driven by a theory of change. When the organization was established in 2002, it began with the primary goal that all therapeutic riding centers aspire to: provide equine-assisted therapies to help individuals with special needs.

Consistently over time, the impactful outcomes of this unique therapy proved to be astonishing, especially for individuals coping with autism. Can a velvet muzzle, the rocking rhythm of a horse’s stride, and the nurturing spirit of Equus really be a powerful prescription? Without a doubt. The barn is truly a magical place where results are visible, tangible, and transforming.

For years the organization followed suit with other therapeutic riding centers throughout the world by providing equine-assisted therapies to individuals with special needs. Then around 2010 a trend began to emerge in the industry: Veterans returning from combat could not get peace from a pill or redefine their purpose in the care of a physician, but they were finding healing in a new version of an old relationship—horses and heroes. The relationship between horses and people is as old as armies, and the bond passed down through centuries still resonates in the hearts of heroes today. The synergy between these two great creatures has provided a more impressive outcome for equine-assisted therapies than ever before.

This increasingly powerful antidote for autism and PTSD silently sits stationed in stables across the U.S. Until someone closes the gap that exists between practicing and proving this powerful source of healing, it will remain in reserve, and that would be a regrettable disservice to those who have sacrificed to protect our very lives.

The time has arrived for someone to tackle the task of conducting valid research to substantiate the claims that armchair psychologists have made for decades. The industry must not continue to be bridled by a lack of funding and an inaccurate characterization of mere recreation rather than a miraculous source for mental health healing. This is the vision of McCormick Research Institute. Therapeutic methods are continuously tested and refined by doctors from the UCF College of Medicine. Evidence-based research is conducted and exhaustively reviewed. Veterans Affairs, insurance companies, health professionals, and philanthropic investors around the world will know what the most effective equine-assisted therapies are and they will have confidence that this modality of treatment has been perfected and tested.
As a result, Veterans suffering from PTSD and individuals with special needs worldwide will have increased access to this exceptional prescription that doesn’t come in the form of a pill. As a Veteran commits suicide nearly every hour of every day, McCormick Research Institute takes on this task because their cry is our call to duty. We invite you to be all that you can be by investing in the vision to restore the disadvantaged and those who have given their all so we may be free.

**Vision Statement**

McCormick Research Institute expands access to effective equine-assisted therapies for Veterans and individuals with special needs worldwide.

**Mission Statement**

McCormick Research Institute delivers the highest quality of equine-assisted therapies to veterans struggling with PTSD and individuals with special needs while conducting research to identify effective practices and disseminate that knowledge to industry practitioners.

**Veteran trail ride**

**2017 Accomplishments**

1. The organization made great gains is in the goal to deliver marketable product/curriculum and to demonstrate proof of concept via the research initiatives conducted in partnership with UCF College of Medicine. This is part of the McCormick Research Institute Board’s seven-year strategic plan that adopts a model combining endowment, product and service revenue, and retail fundraising to achieve sustainability. See strategic plan details at McCormick.us
2. McCormick moved into a new $1.6 million, 40-acre, lakeside facility constructed and funded by Osceola County. The facility is just south of the UCF College of Medicine and VA Medical Center in the Lake Nona area.

3. McCormick signed a Memo of Understanding with the Veterans Administration of Lake Nona.

![McCormick Research Institute at Osceola County Therapeutic Equestrian Center](image)

**Primary Goals for 2018**

1. Complete development of four sets of psycho-educational curriculum that will be tested in 2019 for programs serving Veterans struggling with PTSD. This curriculum will be refined with consideration given to observations and lessons learned throughout the past three years of research pilot studies. We expect that this curriculum will also be able to be adapted for different groups to be delivered and also sold to other practitioners (various mental health needs, corporate wellness workshops).

2. Add a minimum of three new board members who can bring additional skills and relationships that will support endowment strategies, business development, and research initiatives.

3. Conduct a marketing campaign in an effort to attract investors who are passionate about making a local and worldwide impact that enables more veterans and special needs individuals to receive effective equine-assisted therapies.

**Geographic Impact**

McCormick Research Institute provides equine-assisted therapies to Veterans and individuals with disabilities throughout Central Florida. However, it is the goal of McCormick Research Institute to take knowledge gained from research and disseminate effective methods,
protocols, and best practices worldwide. McCormick Research Institute hopes to demonstrate to organizations, such as Veterans Affairs, the Department of Defense, and insurance companies, the effectiveness of equine-assisted therapies, and champion an initiative for VA centers, the DOD, and medical service providers nationwide to build partnerships with organizations that provide equine-assisted therapies.

Needs

1. The VA presented a need to serve a group of 10 recently rehoused veterans struggling with PTSD. These individuals are on our waitlist and a grant supporting this group would be incredibly valuable in 2018. The formerly homeless veterans are in a vulnerable transition and the potential for impact with this initiative is significant. All services are delivered onsite by a Licensed Mental Health Therapist. Contributions or grants supporting services for Veterans struggling with PTSD would cover the expense of $3,125 for 10 weeks/40 hours of therapy per veteran.

2. We moved into a new facility in 2016 and there are several completion expenses still existing. Investments given to assist with the facility will support completing the new facility. Gifts will be used for barn flooring, tractor storage, and facility rental furniture and storage.

3. Contributions or grants supporting individuals with special needs are needed ($1,000 for 10 weeks/10 hours of therapy—serves one individual).

4. Staff development sponsorships to provide continuing education opportunities for staff ($1,200 each).

5. Organization Wish List:
   - Arena drag—$3,500
   - Arena border, to hold footing in place—$8,000
   - Aisle way flooring, to keep horses from slipping in barn—$15,000
   - PA Sound system—$1,500
   - Popcorn machine for events—$250
   - 6-horse, all-aluminum trailer—$30,000. A trailer is needed to pick up horses that we adopt and use in our programs, and to use for transporting horses for Special Olympics and Veteran’s Drill Team exhibitions.

History

Heavenly Hoofs began in 2002 at the home of the Tompkins family. Horse enthusiast Thomasa Sanchez was the Center’s founder, first instructor, and continues today as full-time volunteer CEO.
From 2002-2005 horses were transported to Give Kids the World Village four times a week to provide equine-assisted therapies for terminally ill children in a program dubbed The Pony Express. The program now serves Bishop Grady Villas (residential housing for special needs) as well as Nemours Children's Hospital.

In 2006 the organization moved to Osceola County's Heritage Park and added their second service, the Therapeutic Riding program, which provides ongoing mental, physical, and emotional therapies to individuals with disabilities.

In 2011 Heavenly Hoofs collaborated with the University of Central Florida College of Medicine and introduced the research programs now under the umbrella of McCormick Research Institute. McCormick Research Institute’s Horses & Heroes works in parallel with Heavenly Hooves while evaluating the effectiveness of such therapies, refining their methods, and disseminating the information to industry partners. As the organization has evolved, a fourth program, Equine-Assisted Education, has also formed.

In 2013 Osceola County voted to build a facility in support of Heavenly Hooves' vision to expand into a research center and educational resource for the industry. The organization aims to be the pioneer of the first valid research of its type and be an international leader in the standard of excellence for the industry. For over a decade, the organization aimed to serve the Central Florida community, but now the goal is to have a meaningful, measurable, and significant impact in the industry worldwide.
In 2014 the organization was rebranded to McCormick Research Institute to reflect its broader vision: to validate the effectiveness of equine-assisted therapies and disseminate that information with the goal of helping Veterans with PTSD and special needs individuals have greater access to this form of effective therapy. Other great steps in 2014 included three research studies and the addition of educational courses for UCF med students.

In 2016 we moved to our permanent location at the Osceola County Therapeutic Equestrian Center in St. Cloud, and in 2017 we were accredited as a Premiere Center through the Professional Association of Therapeutic Horsemanship International (PATH Intl.).

The modest beginnings of the organization have grown to serve over 20,000 riders utilizing 15 horses and the assistance of more than 200 community volunteers. At the end of 2016 staff included one full-time pro-bono CEO, five full-time employees, and two part-time staff members.

Programs

At McCormick Research Institute, there is an undeniable magical momentum and abounding gratitude as the organization finds itself positioned for tremendous opportunity. Resting on a decade and a half of service, the organization began transformation in 2011 when a long-term affiliation was formed with the University of Central Florida’s College of Medicine in a joint effort to conduct evidence-based, peer-reviewed research on the effectiveness of equine-
assisted therapies. McCormick Research Institute is the only therapeutic center of its kind in the United States that has a formal research affiliation with a college of medicine.

One of the organization's primary goals is to partner with VA centers to study the usefulness of equine-assisted therapies for Veterans. McCormick Research Institute borders Medical City where the 2nd largest VA Center in the United States is located and partnerships are forming. Additionally, there is opportunity to study the effects of equine-assisted therapies for children with special needs and terminal illnesses at two children’s hospitals in Central Florida.

The swell of support has been incredible. Osceola County voted in 2013 to build a research facility and join in to pioneer the first valid research program evaluating equine-assisted therapies. The organization conducts evidence-based research led by PhD’s and medical doctors, will be the leader in the standard of excellence, and is building an international education resource for the industry and medical professionals. The organization began serving Central Florida and now moves forward to make a meaningful and measurable impact worldwide.

As McCormick Research Institute has been blessed with many opportunities, the organization adopted a seven-year strategic plan to achieve its mission and establish long-term sustainability. McCormick Research Institute board of directors leads the way with strategic, succession, and training plans to meet the responsibilities that will come. The organization’s leaders are an exceptionally passionate and engaged board of directors who are wise, giving, connected, influential, savvy, and sold out to the organization’s mission.

McCormick Research Institute humbly acknowledges that without philanthropic partners and an invested community, we could not begin to touch the tip of the vision. You are invited to be
a part of the meaningful mission. We hope that you will join us as we serve Veterans and individuals with special needs, identify best practices, set international standards, and connect medical professionals and VA centers to equine-assisted providers in their communities.

Summary of Programs

1. Heavenly Hooves Program Serving those with therapeutic and special needs
   Doctors said some would never walk, and now they do. Riders who could not speak, chatter away. Some who had not a single friend, now have many. Approximately 100 clients attend a weekly class to work on strength, coordination, communication, balance, and sensory processing. Many require full financial assistance. Scholarships are awarded to students based on need.

2. Horses & Heroes Program serving Veterans with PTSD
   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. 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 client’s goals. Program activities are designed to improve mental health and foster successful relationships in a civilian society.

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

4. Activities that cover both Heavenly Hooves and Horses & Heroes Programs
   Research Initiatives are conducted through the Horses & Heroes (PTSD) programs. 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.

   Competitive Teams include Special Olympics teams and the Veterans Drill Team, who aim to participate in the Paralympics!
Heavenly Hooves Program

Heavenly Hooves Program Success Story

A beautiful young woman was in a traffic accident resulting in traumatic brain injury and a long period of comatose. She came to McCormick Research Institute, wheel-chair bound, unable to speak, and barely able to use her hands. A year later, after weekly therapeutic visits, she stands from her wheelchair independently, mounts a horse with guidance, and is able (with side-walkers for safety) to control her horse at a walk and trot. Though she can't speak, she now uses her hands to write. The horse's movement aids in the movement of her hip and flexor muscles. Neck-reining her horse improves her grip and upper body strength. The starting and stopping of her horse improves her core strength. Most importantly, this participant cannot seem to ride without a big, wide smile on her face. As we assist in the partnership between these incredible horses and their inspirational riders, it is apparent that we are witnessing something magical on a daily basis. Our daily tasks are more of a privilege than a profession.

Serving Individuals with Special Needs

1. Activities for Special Needs

Doctors said some would never walk, and now they do. Riders who could not speak, chatter away. Some who had not a single friend, now have many. Approximately 100 clients a weekly enjoy therapeutic riding or visit while receiving treatment at a local children’s hospital. Children undergoing chemotherapy bounce back after a visit from our pony. Students at the barn work on core strength, coordination, communication, balance, and sensory processing.
2. Competitive Teams

Riders participate in three Special Olympics annually.

Many participants require significant financial assistance. Therapeutic Riding participant fees account for less than 15% of organizational income.

*Heavenly Hooves participants at Special Olympics*

**Heavenly Hooves Program Success Story**

At the village for children with terminal illnesses, Jason, an 8-year-old with cancer, isn't an anomaly. He's rarely out of the hospital and never travels. His mother calls, “You have horses, right?” We promise to visit tomorrow. Our stellar steed Star stands at attention as scheduled, but Jason is absent. As we drive away, the village calls, "Hurry to villa 107! The sirens you hear come for Jason." Star is swept off the trailer, hooves beat the pavement in step with prayer, and with mom's insistence, the medics drop the stretcher's legs where Jason lies with quiet, eyes closed. Star approaches Jason and nuzzles his face with her velvet muzzle. Jason's soft eyes and big smile invite Star closer. Intuitively, Star turns her head 90 degrees, lays it across his cancer-filled chest, and locks eyes with Jason. Only moments of life are left. Neither horse nor boy can speak, yet a loud message resounds: “Fear not, go with joy.” The moment quickly passes. Immeasurable peace is felt by all.

**Monitoring Heavenly Hooves Program Success**

- Evaluators create a participant record upon enrollment. The initial evaluation assesses, often in tandem with a medical professional and family, the applicant’s history, abilities, and goals. Generic assessments are made and custom criteria is designed based upon
one's unique qualities and goals. The student is assigned a skill level category. Their file includes an evaluation, lesson plans, goals, and qualitative/quantitative data.

- After every class, the instructor records data on student progress. At the end of a 10- or 12-week session, the instructor reviews participant progress to determine the appropriate skill level category for the next session.
- As a whole, student turnover is monitored and client satisfaction surveys are used to measure program success. Surveys measure quality of life, opportunity to be physically active, and social aptitude.
- Instructors are PATH certified, engage in continuing education, participate in 360-degree evaluations, and set annual goals.

Heavenly Hooves participants in session

Horses & Heroes Program

The Horses & Heroes program was established to serve Veterans suffering from PTSD. To date, all Horses & Heroes participants have served as subjects in our equine-assisted group therapy research initiatives that include doctors/researchers, licensed mental health professionals, and of course horses. Each year, dependent on funding, the organization offers two to four, 10-week group therapy sessions to ten Veterans (each session) struggling with PTSD.

Horses & Heroes Program Success Story

After interviewing Veterans in the Horses & Heroes program, Diane Rodriguez wrote in her article The Healing Power of Horse Therapy for PTSD, “People who live in a state of hyper-vigilance can feel threatened by everyday events, and horses live in a similar state. Much like military groups, horses are loyal and stick together for safety.” These are just a few of the many
aspects that create a connection between a Veteran and a horse. One of our former participants is a double leg amputee and has some damage to his right arm and hand as well. When he first arrived at the barn he remained silent and, and even though he would never admit it, fairly nervous about the size of the horses and the thought of mounting one. McCormick Research Institute horses are quite unique and special, and one in particular has been mounted by individuals of every conceivable disability throughout his life. This particular horse will move forward with the touch of a rein to his neck, which this particular veteran was quite able to do. Eight weeks into the program, this veteran began working with other Veterans in his class performing basic drill team movements at both a walk and a trot, with no fear and no trepidation. The other veterans in the class refused to participate in any therapy activity that this particular veteran could not perform, and those were few. Amazingly, this Veteran eventually rode in the Drill Team, where he had a sense of purpose and connection. “Coming off my couch, out of my wheelchair, and representing Veterans at rodeos motivates me so much. I had almost committed suicide, but I wouldn’t think of it now. I never want to miss all this!”

**Serving Veterans**

1. **Group Counseling—Research Participants**

   The group meets once a week for approximately three hours. The mental health therapist facilitates an ice-breaker activity, then the group participates in an activity with the horses with a theme such as communication. At the end, a wrap up session is facilitated by the therapist, who draws upon observations and conversations that occurred during the interaction with the horses. To illustrate, with the theme of communication, ten participants will be given a halter and directed to go catch one of the ten loose horses in the arena. As this activity transpires, the mental health therapist notes how individuals communicate with the horses during the activity and coaches them by applying the situation to everyday experiences.

2. **Therapeutic Services—Research Participation Not Required**

   In the near future, we aim to offer group and individual counseling sessions (non-research) to Veterans diagnosed with PTSD. Services will be offered in tandem with a licensed mental health professional. Participants will engage in both mounted and groundwork activities. Program activities are designed to improve mental health and foster successful relationships in a civilian society. As Veterans complete a counseling workshop series, they often become volunteers, serve as mentors in the Horses & Heroes program, and/or graduate to other Horses & Heroes activities.
3. Recreational Activities

   In the riding instruction program, Veterans continue to reconnect in a foreign world and rediscover a sense of purpose. A certified riding instructor facilitates 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 the research workshop series can apply to join the Drill Team.

Monitoring Horses & Heroes Program Success

Program success is monitored by MD's from the University of Central Florida as well as PhD researchers from other departments within UCF. Preliminary research indicates that the Veterans program is tremendously successful. Veterans tend to begin their therapeutic sessions skeptical and nervous. Within a few weeks they have discovered new confidence when they realize, after proper instruction, that the horse with which they are partnered means them no harm and is willing to work with them. Once that level of confidence is reached, there is no turning back. The vast majority of participants want more and more interaction and there is an abundance of interest in continuing on to volunteer or participate in other Horses & Heroes activities.

Short-Term Horses & Heroes Measurements

Short-term success is measured scientifically through pre-and post-testing of the Veterans, and our therapeutic strategies and program curriculum is adjusted accordingly as we move along. Surveys and assessments are completed that include both qualitative and quantitative measures. The primary measures used are the depression inventory, social interaction survey, and degree of prescribed medication being used. All assessments are evaluated by the Research Committee and peer-reviewed by the UCF College of Medicine's Internal Review Board. At the end of each workshop series, the Research Committee convenes to refine the program and implement lessons learned in the upcoming workshop series.

Long-Term Horses & Heroes Measurements

Reduced and optimally managed suicidal rates of Veterans is the most impactful indicator of program success. As well, the effort aims to decrease Veteran's dependence on medication and increase their ability to using an alternative coping mechanism as they manage PTSD. McCormick's Veterans show dramatic decreases in depression and anxiety, and increases in confidence and self-esteem--even over a short, 10-week duration. These characteristics only improve over time, and many Veterans who complete our program are serving as mentors and members of the Drill Team. These activities are a source of pride for the wounded warriors and serve to remind them of their valued purpose both at war and within a peaceful homeland.
Research Initiatives

Research Initiatives Success Story

Industry partners and media experts are excited for McCormick Research Institute to demonstrate the effectiveness of what they have been observing for years. In 2017 McCormick successfully achieved Premiere accreditation with the industry's governing leader, PATH (Professional Association for Therapeutic Horsemanship) International.

As well, a variety of television stations, newspapers, and video crews visited our facility to interview our staff and participants.
In partnership with the University of Central Florida School of Medicine, evidence-based research is conducted with the goal of producing research, identifying best practices, and designing/validating/disseminating the most impactful treatments for Veterans 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 program 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 in social interaction, calm and soothe timid individuals, and inspire children to make eye contact, perhaps for the very first time.

**Veterans Challenged by PTSD 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 society successfully. This research initiative is a backbone of the organization and drives forward a vision to help veterans nationwide benefit from improved mental health and have greater access to effective equine-assisted therapies.

**Monitoring Research Initiatives Success**

Program success is monitored by teams of MD’s and PhD’s from the University of Central Florida. Qualitative measures such as pre- and post-interviews are conducted, as well as quantitative measures such as the Becks Depression Inventory are used. A robust (10 individuals) research committee meets to evaluate current outcomes, discuss needs and observations, and propose adaptations and research questions to be investigated next. All success is measured against the highest of academic and professional standards.

**Short-Term Research Initiatives Measurements**

In 2014 a study on autism was funded with a $30,000 grant and results are currently being evaluated. Surveys and paper/pencil assessments were made. Plans are underway for another study to carry forward another autism study that will use physical tests (measurement of stress level hormones in saliva) to assess benefits in stress reduction.

As well, two studies were conducted evaluating Veterans with PTSD. At the end of the year, two participating Veterans spoke on a panel at an international conference on equine-assisted
therapies and testified that the experience stopped them from committing suicide and redirected them with a renewed sense of purpose.

**Long-Term Research Initiatives Measurements**

The pinnacle success of the research initiatives will be the adoption of this modality of treatment worldwide. McCormick Research Institute aims to demonstrate the effectiveness and validity of this modality of treatment, spread that message worldwide, and in turn expects to see more programs funded and more Veterans and individuals with autism benefitting from this exceptional treatment.

**Educational Program**

The Education program currently provides classes to UCF College of Medicine students. Horses are used to help medical students become aware of their non-verbal communication in order to improve bedside manners in medical practice. In the future, these UCF classes will be offered to all students across Allied Health departments. The Medicine and Horsemanship class is co-facilitated by McCormick Research Institute staff and Dr. Manette Monroe of UCF College of Medicine.

In years to come, McCormick Research Institute will offer continuing education to medical professionals for CEU credits. McCormick Research Institute also aims to provide PATH certification courses and courses that are designed to teach industry partners how to conduct valid research on equine-assisted therapies.

**An Educational Program Success Story**

Medical student Erica Crump described her class experience. "It has been very interesting to pick up on the non-verbal cues from the horses and then relate that back to patient care. The energy you bring to the patients is really similar to that energy you use in handling the horses."

Please view a video about the Medicine and Horsemanship class.
http://www.youtube.com/watch?v=a1Ld2GC3Izc

**Monitoring Educational Program Success**

Class evaluations and surveys are completed by students at the end of each semester. As well, interviews are conducted to gather qualitative data to help McCormick Research Institute refine these educational programs. Furthermore, the instructional staff meets after each class to discuss the success or shortcoming of that day's curricula and in turn plan for adjustments as needed.
Educational Program Short-Term Measurements

Immediate results are being achieved each college semester as medical students complete the Medicine & Horsemanship class. Students graduate the course with a profound understanding of how their bedside manners (non-verbal communication) can impact their patients. Students undergo practical tests of their bedside manners pre- and post-class. Students have demonstrated statistically significant improvements in their non-verbal skills after completing the class.

Educational Program Long-Term Measurements

McCormick Research Institute will grow to serve industry partners internationally. Participants will include medical professionals, college students, equine-assisted therapy providers, and researchers.

Currently, many equine-assisted therapy centers proudly proclaim the effectiveness of equine-assisted therapies, but few have knowledge of proper methods and valid measurements for testing their theories. McCormick Research Institute will fill that void by identifying best practices, articulating appropriate research protocols, and disseminating the information to the equine-assisted community around the world.
Impact

Goals

The goal of McCormick Research Institute is to enable more Veterans with PTSD and individuals with special needs to benefit from effective equine-assisted therapies worldwide. While many promote the effectiveness of equine-assisted therapies, particularly for PTSD, few have done much to validate their theory. McCormick Research Institute focuses on testing, refining, and validating this modality of treatment. As an indirect outcome of the process, participants receive the highest quality of services under the direction of medical researchers.

Over the next decade, the organization will complete many research studies, refine and define best practice methods, and then disseminate the information. As this occurs, McCormick Research Institute will become a catalyst of connection between equine-assisted therapy providers and VA centers, medical providers, and health insurance companies throughout the world.

In an effort to achieve this widespread impact with lasting and meaningful change, the robust strategic plan positions the organization to fulfill its vision with the support of these pillars:

1. Governance—Knowledgeable and engaged board of directors moving the organization forward with a message clearly resonating the investible opportunities.
2. Results focused management—Management that governs and develops programs that are effective, efficient, and create measurable impact.

3. Transparency—Full disclosure and accountability to maintain trust, guide donors, and encourage charitable giving.

4. Communication—Mission, vision, values, and brand essence conveyed in a way that is well-defined, appealing, and timely.

5. Systems and information technology—User friendly, contemporary, scalable systems and IT providing order, accessibility, and efficiency.

6. Fundraising and financial resource—Adequate financial resources to move strategic plan forward at a healthy pace.

7. Staff—Sufficient staff with the right skills and right attitude in the right positions.

8. Tools—Ample tools to conduct mission and scale operations towards the vision in a safe, professional, and efficient manner.

9. Program services—Offered at the right price in the right way to achieve the right impact.

10. Program growth initiatives—Sustainable growth of new programs at a pace that enables the organization to achieve worldwide impact.

Strategic plans and services are all results-driven, comprehensive yet adaptable as deemed, and based on validated methods. McCormick Research Institute's mission is championed by a unique partnership with the University of Central Florida College of Medicine. While there are many armchair psychologists advocating equine-assisted therapies, there is only one College of Medicine in the United States who currently studies this dynamic form of medicine, and those UCF medical researchers call McCormick Research Institute their home.

Recent Progress

Recent progress toward goals include:

- Transition in branding successfully occurred; whereby, the focus moved from Heavenly Hooves “horse organization” to McCormick Research Institute serving a targeted population.
- A seven-year strategic plan was adopted with the goal of fulfilling the vision and strengthening sustainability.
- The center was PATH accredited.
- Board participation was strengthened with the addition of 11 new members.
- Partnerships were formed with local industry partners.

The facility resources, vision and values maturity, development of systems and community partnerships, increase in contributions, and research studies all serve to increase the
organization's capacity for anticipated growth. This synergetic momentum is remarkable and inspires the organization to work diligently on tasks that are on the horizon.

The board and staff have a clear and vibrant vision and daily efforts always have measurable results in mind. The progress made to date keeps the organization focused and determined to realize the mission to help individuals with special needs and Veterans with PTSD across the nation.

Strategies

Driven by vision and values, McCormick Research Institute rests upon a bedrock of values that include: integrity, innovation, transparency, collaboration, superior service, sophisticated systems and tools, and a respect for results-focused management. Adherence to these areas of excellence will support a tapestry of ambitious goals and smart strategies, creating impact stretching far beyond the organizations backyard. The effectiveness of equine-assisted therapies will be tested and validated. A library of evidence-based research and best practices will be disseminated worldwide. Less Veterans will commit suicide. More individuals with autism will experience peace. A sample of the strategies (s) employed and current actions (a) include:

1. Governance—(s) All board members are engaged and can clearly communicate mission, vision, brand essence, and investible opportunities; (a) ensure all board members know "elevator speech."
2. Results focused management—(s) Results are regularly tracked, evaluated, and reported in light of targeted outcomes; (a) measure organization against "8 areas of non-profit excellence."

3. Transparency—(s) Always provide current, audited, organizational information in the public domain.

4. Communication—(s) Provide appealing, clear messaging, showcasing niche and credibility; (a) create and test collateral material that clearly conveys mission, vision, programs, brand essence, needs, and transparency.

5. Systems and information technology—(s) Employ scalable systems and provide real-time data; (a) implement donor management software.

6. Fundraising/financial resources—(s) Diversify fundraising strategies; (a) create prospecting plan.

7. Staff—(s) Leadership at all levels actively mentor staff; (a) conduct staff workload and customer satisfaction surveys.

8. Tools—(s) Increase capacity with well-managed and adequate facilities; (a) obtain, budget, or write grants for equipment as needed.

9. Program services—(s) Offer services at the right price; (a) evaluate pricing and adapt if needed.

10. Program growth initiatives—(s) Build scalable systems at a sustainable pace; (a) create strategic plans for each program.

Capabilities

The goal of McCormick Research Institute is to enable more Veterans with PTSD and individuals with special needs to benefit from effective equine-assisted therapies worldwide, extensively by 2022. Success will be achieved when validated research demonstrating effectiveness of this form of therapy is repeatedly published, there is a 30% increase in funding for equine-assisted programs, and there is a 30% increase in availability of services worldwide.

The capability of achieving these goals is supported by these strengths:

1. A strategic plan that includes rigorous measurement, the establishment of an endowment, and development of additional revenue streams for long-term sustainability.

2. An engaged and knowledgeable board of directors.

3. Relationships with invested partners, including the University of Central Florida College of Medicine and Osceola County.

The board of directors are highly respected individuals who hold key relationships within Central Florida, which was helpful in the realization of the new equine facility. Extraordinary
directors include Mark Miller, owner of Al-Marah Arabians, and Charles Roberts of the University of Central Florida, a respected development and fundraising executive for the University of Central Florida. Mr. Roberts is part of the leadership team who will mentor the organization's development professionals. Domingo Sanchez, also a director of the Greater Orlando Airport Authority, is an active leader in the Central Florida community and has great insight on methods for growing a local business to one of international influence. Several other board members lend valuable expertise and support, and freely utilize their expansive networks and relationships to promote the organization's vision and investible opportunities.

McCormick Research Institute leadership is well-respected within the equine industry. Founder and CEO Thomasa Sanchez is herself an accomplished horsewoman, a tireless promoter of the mission, and a featured presenter at international equine-therapy conferences.

A foundation for success lies in the partnerships between McCormick Research Institute and UCF, as well as Osceola County. UCF upholds high benchmarks and ambitious inquiry. Osceola County prides itself with a new facility custom-built for the mission, and together these partnerships form cords that strongly support the intent to impact the world with effective, rigorously tested equine-assisted therapies.

The organization aims for courageous goals. With a clear strategic plan, board members willing to share their relationships and resources, expert leadership, and partnerships with UCF and the local community, McCormick Research Institute is poised for impact.

McCormick staff and partners
Indicators

Qualitative and Quantitative Measures—Key Milestones

McCormick Research Institute uses extensive indicators of progress. A sample of qualitative and quantitative indicators and key milestones the organization intends to observe over the next three years include:

Within a year:

- Has the organization crystalized a strategic plan that includes extraordinary board participation; rigorous measures and evaluation standards; effectively communicated and promoted a vivid vision in an effort to engage investors; and solidified a strong, solid foundation that can sustain and support mission?
- Are three to four studies being conducted annually in an effort to identify and refine methods of treatment?
- Is there adequate staff support to drive forward the research and executive administration of the organization's sophisticated, ambitious vision?
- Are 100% of board members and staff fluent with the "elevator speech?"

Within 3 years:

- Has the organization begun to produce at least one reported study in a published peer-reviewed research journal annually?
- Has the organization increased the donor/funder base significantly in order to support sustainability and research efforts to produce and replicate enough studies to validate effectiveness of equine-assisted therapies?
- Has the organization poised itself to have the capacity to serve Veterans with PTSD from the 2nd largest VA in the United States?

Monitoring, Measuring, Refining Process

The organization's vision to validate this modality for treating PTSD and specific disabilities requires that the strategies and outcomes are keenly monitored and refined. In partnership with Dr. Manette Monroe and Dr. Tracy Wharton of UCF, the CEO continually monitors progress and then delivers a report to the organization's Research Committee and this topic is the centerpiece of discussion. Then, a report is generated after the research committee meets and is presented at each board meeting, detailing actions taken, measures used, outcomes observed, and recommendations for further investigation or adaptation.
Management

McCormick Research Institute is undergoing a transformational change from a small homegrown organization to one of impactful vision, large scope, strategy, and implementation. All executive and sophisticated administrative duties have nearly been the sole responsibility of the volunteer CEO. However, McCormick Research Institute board of directors has made significant investments to propel the organization forward. As well, the organization has designed a strategic plan to build a management structure that will support the next step in the growth of the organization.

CEO Experience

Thomasa has been showing, breeding, and raising horses for over 25 years in Kissimmee, Florida. In 2002, she founded Heavenly Hooves, now known as McCormick Research Institute. Her educational background includes a Bachelor of Arts degree from Rollins College, a Master of Arts in Communication from the University of Central Florida, and post-graduate studies in Organizational Psychology at Florida Tech. Thomasa has been an adjunct professor at Valencia College since 1994, is a non-fiction writer, serves on the Central Florida Foundation Board of Directors, and often entertains audiences as a keynote speaker. She enjoys her love for horses by both serving McCormick Research Institute and also spending her personal time showing competitively with her daughter Skylar Sanchez. In 2014 one of the Sanchez’ horses earned a prestigious World Championship title in the jumping division.

Collaborations

McCormick Research Institute has an affiliation agreement with the University of Central Florida College of Medicine. As well, McCormick Research Institute has an agreement with Osceola County; whereby, the organization receives use of 40 acres, barn, and covered arena in exchange for producing on-going research on equine-assisted therapies.

McCormick Research Institute is a member of the Professional Association of Therapeutic Horsemanship International (PATH), and also collaborates with Bishop Grady Villas (residential housing for special needs) and Nemours Pediatric Hospital.
Management Standards
The organization operates under professional standards. The organization has a strategic plan, management and succession plan, business continuity plan, fundraising plan, and a policies and procedures manual that includes a non-discrimination policy as well as a whistleblower policy. All management leaders report directly to the board and all staff is provided annual training and performance evaluations that include goals and timelines.

Staff
McCormick Research Institute has been led by Thomasa Sanchez since 2002. As of December 2015, there are six full-time staff (including CEO), two part-time staff, and over 200 volunteers.

Governance
McCormick Research Institute is led by an exceptionally engaged board of directors who are savvy business people with a shared passion and vision for making a broad impact with the mission. In 2016 board attendance exceeded 90% and collectively board members donated in excess of $100,000 worth of in-kind contributions.
McCormick Research Institute board of directors, Osceola County, and the University of Central Florida partners are a robust group of social entrepreneurs who are committed to helping more Veterans and individuals with special needs worldwide benefit from effective equine-assisted therapies.

**Terms, Demographics, Committees, & Policies**

One hundred percent of the board contributes annually to McCormick Research Institute and meetings have 91% attendance. Board members serve terms of three years, with a maximum of three terms. The current board is composed of eight men and five women. There are 12 Caucasians and 1 Hispanic.

Board committees include an executive committee, a finance committee, and a board development committee. McCormick Research Institute board policies include a conflict of interest policy, a non-discrimination policy, and a policy for board selection criteria.

**Financials**

Many expenses have been circumvented due to in-kind gifts such as the use of trucks, trailers, and horses. As well, the CEO/Executive Director works full-time pro-bono and this is a significant savings.

Furthermore, the financials do not reflect the benefit of land and facilities provided at no cost to McCormick Research Institute and the value of partnerships such as the one with UCF School of Medicine. The 40-lakeside-acre facility is provided to the organization at no cost from Osceola County, with a 20-year lease agreement. There is no rent expense for the use of the facility, however, the agreement with Osceola County requires the organization to actively conduct research on equine-assisted therapies. While UCF provides no direct dollars, they offer substantial in-kind value with their grant research services and the time UCF researchers invest in McCormick Research Institute initiatives.

McCormick Research Institute is currently undergoing a paradigm shift from ordinary therapeutic riding services, expanding into a national research center and educational resource for the industry. The organization aims to be the pioneer of the first valid research of its type, be an international leader in the standard of excellence for the industry, and disseminate information in an effort to help Veterans with PTSD and individuals with special needs worldwide have greater access to this form of therapy.
For over a decade, McCormick Research Institute aimed to serve the Central Florida community, but now the goal is to have a meaningful, measurable, and significant impact in the industry worldwide.

**Financial Information**

McCormick Research Institute has audited financials and 990’s that are available upon request or for viewing on the website: McCormick.us. 2018 projected income is approximately $500,000.

**Revenue & Expense Graph**

![Revenue & Expense Graph](image)

**Total Hours of Therapy Received Annually Per Group Graph**

![Total Hours of Therapy Received Annually Per Group Graph](image)
Prior Four Years Expense Allocations Chart

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
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<tbody>
<tr>
<td>Program Expense</td>
<td>$45,567</td>
<td>$87,392</td>
<td>$37,134</td>
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<tr>
<td>Administration &amp; Fundraising Expenses</td>
<td>$395,756</td>
<td>$348,667</td>
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<tr>
<td>Program Expense/Total Expenses</td>
<td>11%</td>
<td>24%</td>
<td>13%</td>
<td>13%</td>
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Prior Five Years Total Revenue, Expenses, Assets Chart

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<tr>
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<th>2014</th>
<th>2013</th>
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<tr>
<td>Total Revenue</td>
<td>$491,941</td>
<td>$657,979</td>
<td>$325,657</td>
<td>$389,875</td>
<td>$338,691</td>
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<td>Total Expenses</td>
<td>$441,323</td>
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<tr>
<td>Total New Assets</td>
<td>$46,897</td>
<td>$199,436</td>
<td>$224,938</td>
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<td>$184,060</td>
</tr>
</tbody>
</table>

Summer Camp trail ride