

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.



2018

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Strategic Plan Snapshot

	KRA's Key Result Areas	CSF's Goals – Critical Success Factors	STRATEGIES 2 Years (2018-2019)	ACTIONS & MEASUREMENTS 2018	OWNER/S
Our Mission The McCormick Research Institute serves individuals with special needs and Veterans struggling with PTSD in programs known respectively as Heavenly Hooves and Horses & Heroes.	Vision & Growth Initiatives	<i>Growth of programs at a pace that enables the organization to become sustainable and achieve its vision</i>	<ul style="list-style-type: none"> Strengthen relationships with VA, policy makers, funders, industry partners Build scalable programs & sustainable revenue streams 	<ul style="list-style-type: none"> 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 Identify 5/8 VA employee on research team Secure funding grant for 2019 	Thomasa Thomasa/Eric Thomasa/Joanne Thomasa Thomasa Thomasa
	Governance	<i>Knowledgeable and engaged Board of Directors helping move the organization forward</i>	<ul style="list-style-type: none"> Engage Board members Ensure familiarity with M/V/S Plan Significant stewardship of BMbrs Attract appropriate Board members 	<ul style="list-style-type: none"> Create and teach Board members “elevator speech” w/100% knowing spiel Steward 4 active committee chairs who meet 4x/yr minimum Four committees active w/4 meetings min w/goals & comm. rpts @ each Board meet. 	Thomasa Exec. Staff Exec. Staff
	Staff	<i>Enough staff with the right skills & right attitude in the right position</i>	<ul style="list-style-type: none"> Recruit and develop right talent Balance workloads Encourage prof. development Leadership actively mentors staff 	<ul style="list-style-type: none"> 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 	Stra Plan Comm Thomasa Kelli Kelli
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.	Fundraising/ Financial Resources	<i>Adequate financial resources to move strategic plan forward at a healthy pace</i>	<ul style="list-style-type: none"> Diversify fundraising strategies Strengthen donor trust and partnership Clearly convey investible opportunities Evaluate UBI opportunities Increase economies of scale 	<ul style="list-style-type: none"> Submit 7 grants in 2018 Mail thank yous 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 Comm present funding plan 	Kelli Beth New staff Kelli Wendi Jeannin Fin/Fund De Co
	Communications & Information Technology	<i>Mission, vision, values, brand, IT essence conveyed in a way that is well-defined, appealing, and time</i>	<ul style="list-style-type: none"> Provide appealing, clear messaging showcasing niche and credibility Expert internal M/V/SP knowledge Useful IT, public relations/social media in order to be relevant and connected 	<ul style="list-style-type: none"> 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 Amy Kelli Kelli Natl. Affaris Co Local Aff. Com
	Systems	<i>Up to date, accurate, scalable systems providing order, accessibility, & efficiency</i>	<ul style="list-style-type: none"> Standardize and organize forms, records, & processes Provide real-time data Design scalable systems 	<ul style="list-style-type: none"> Hold staff accountable for assigned records & purging with annual August audit P & L and A/R reviewed and corrected for errors within 1 week of each 1/4 close Manage accounting so that real-time data is available & accurate Send Past Dues January, February, June & July Generate “No Service” letters & list 3/31 & 8/31, review AR/write off bad debt & w/o by 12/31 Financial data easily generated, and cost allocation reviewed and up to date on all “products” 	Kelli Beth Kelli Beth Beth Thomasa
Our Values Gratitude Integrity Excellence Collaboration Transparency Access and Inclusion Character Development Innovation & Research Community & Connection Integrity & Accountability Belief in the Grace, Hope, Purpose and Power Available Through Relationship with God	Tools	<i>Ample tools to conduct mission and scale operations towards vision in a safe, professional, efficient manner</i>	<ul style="list-style-type: none"> Increase capacity Understand equipment and horse needs and manage to meet needs 	<ul style="list-style-type: none"> Wish list up to date and open to public Seek funding for fixed asset Get funding to build space for training rooms 	Kelli Thomasa Thomasa
	Transparency	<i>Full disclosure & accountability to maintain trust, guide donors, & encourage charitable giving</i>	<ul style="list-style-type: none"> Have highest industry endorsements Provide current organizational information in public domain Provide current organizational information to Board, donors and staff 	<ul style="list-style-type: none"> 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 4/1 Initiate annual 990 by 6/1 	Kelli Kelli Thomasa Thomasa
	Results Focused Management	<i>Management that governs and develops results-based programs that are effective, efficient, and create measurable impact</i>	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Record participation numbers in all activity Adjust Strategic Plan initiatives according to prior year measurements & results 	Marcy/Caity Kelli
	Program Services	<i>Program services offered at the right price in the right way to achieve the right impact</i>	<ul style="list-style-type: none"> Offer services at the right price Bill and collect on time Deliver impactful services Increase (internal) community engagement 	<ul style="list-style-type: none"> 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 Kelli Kelli

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

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

- | | |
|--|-----------------|
| <input type="checkbox"/> Create and teach Board member “elevator speech” with 100% knowing spiel | Thomasa |
| <input type="checkbox"/> Steward four active committee chairs who meet 4x/year minimum | Executive staff |
| <input type="checkbox"/> Four committees are active w/4 meetings min w/goals & committee reports at each Board meeting | 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
- Board level leadership mentoring—Leadership Development Plan development
- Staff level leadership mentoring—Leadership Development Plan development
- Staff Accountability—quarterly review of Strategic Plan

Strategic Plan Comm.
Thomasa
Kelli
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

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

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

- | | |
|--|---------|
| <input type="checkbox"/> Hold staff accountable for assigned records & purging with annual August audit | Kelli |
| <input type="checkbox"/> Manage accounting so that real-time data is available & accurate | Beth |
| <input type="checkbox"/> P & L and A/R reviewed and corrected for errors within 1 week of each 1/4 close | Kelli |
| <input type="checkbox"/> Send Past Dues January, February, June & July | Beth |
| <input type="checkbox"/> Generate “No Service” letters & list March 31 st & August 31 st | Beth |
| <input type="checkbox"/> Review A/R and write off anticipated bad debt by December 31 st | Beth |
| <input type="checkbox"/> Financial data easily generated for grant applications, reports, and analysis | Thomasa |
| <input type="checkbox"/> Cost allocation reviewed and up to date on all “products” | Thomasa |

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
- Seek funding for fixed asset needs
- Get funding to build space for training rooms

Kelli
Thomasa
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

- | | |
|---|-------|
| <input type="checkbox"/> Summer Camp Book Completed by 6/1 | Marcy |
| <input type="checkbox"/> Facilitate client interviews/surveys to assess impact | Kelli |
| <input type="checkbox"/> 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.

Departmental Chart/Growth Initiatives Illustration

Yellow Indicates Areas of Growth

