



Business and Heart?

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Professional Association of Therapeutic
Horsemanship International

Center Sustainability

Data Gathering

- Focus groups
- Interviews with closing centers
- Web-based surveys

Key Factors That Relate to the Center's Sustainability

- Funding
- Succession plans
- Qualified staff – low/lack of pay
- Board issues

Running Your Center Like a Business

Benefits?

Barriers?

Nonprofit Definition

A corporation or an association that conducts business for the benefit of the general public without shareholders and without a profit motive.

Running a Business

What Are the Components of a Business?

- Vision/Mission/Values
- Board
- Staff leadership
- Programs
- Facility/Equipment
- Finances
- Marketing/PR
- Community involvement
- Staffing
- Volunteers
- Strategic plan/Business plan
- Legal requirements
- Succession planning



Vision Mission Values



Board of Trustees

Best Practices

Board of Trustees

- Term limits
- Job descriptions/written expectations for board and staff leadership – clarity of roles
- Clear criteria for joining the board
- Clear application process
- Orientation
- Clear financial giving expectations
- Staff not a voting member of the board
- Understanding governance versus operational board work
- Board self-assessment

Board of Trustees

Resources

- Boardsource.org
- United Way
- National Council of Non-profits



Staff Leadership

Best Practices



Staff Leadership

- Job description/clarity of role
- Contract
- Overseen by full board, not one board member
- Autonomy to carry out operations
- Focus of position should come from the strategic plan goals
- Equine experience not required
- Leadership, especially nonprofit, required
- Paid versus unpaid



Program(s)

Best Practices



Program(s)

- ROI
- Community needs analysis
- Resources
- Budget
- Goals
- Thoughtful planning



Facility & Equipment

Best Practices



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Facility & Equipment

- Facility
- Tack
- Equipment



Finances & Budget

Best Practices



Finances & Budget

- Diversified funding
- Budget development and review

Finances & Budget

- Financial Policies and Procedures
 - Gift acceptance policy
 - Investment policy (for those contingency reserves you will build up 😊)
 - Contingency/Reserve policy
 - Document retention and destruction (see your state laws) policy
 - Wire transfer authorization
 - Contract and check signing policy
 - Credit card policy
- Financials Review
- Financial Projections
- Financial Audit
- 990



Legal

Best Practices



Legal

- Bylaws
- Insurance
- Taxes
- State charity registration



Fundraising

Best Practices



Fundraising

- Goals
- ROI on event/activity
- Fundraising on commission
- Identify purpose and build the case
- Transparency
- Fulfilling promises

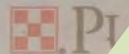


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Community



Staffing

Best Practices



Staffing

- Certified and/or licensed professionals
- Job descriptions
- Professional development
- Annual evaluations
- The right people on the bus



Equines

Best Practices



Equines

- Standard of care
- How many equines needed to provide services?
- Cost of one equine's care?
- Screening process for equine intake?
- Equine orientation process?
- Process to address behavior issues?
- Process for retirement?
- Is your organization strictly EAAT or is it a horse rescue operation?



Volunteers

Best Practices



Volunteers

- Job Descriptions
- Intake/orientation
- Training
- Ability to remove a volunteer



Strategic Planning

Best Practices

Strategic Planning

- Outside facilitator
- SWOT analysis/Trends analysis
- Data gathering
- Board/staff retreat
- Reviewing mission/vision/values
- Understanding your competitive advantage
- Agreement on direction and priorities
- Goals development – SMART Goals



Succession Planning

Best Practices

Succession Planning

- Both board and leadership staff
- Are the board and leadership able to continue after a departure?
- Abrupt and planned departures
- Not about picking a successor
- What happens during the transition?
- Founders



Maintaining the Heart

Key Takeaways





**Thank
You**



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