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I.

ACKNOWLEDGEMENTS



Dear PATH Intl. members, friends and stakeholders,

On behalf of the PATH Intl. Board of Trustees and Staff, we are pleased to present the *2013-2016 PATH Intl. Strategic Plan*. PATH Intl. has grown over the last six years as the equine-assisted activities and therapies industry has matured and changed in scope. It is our intention that this plan will keep the association at the forefront of new developments.

We are grateful to our Strategic Planning Committee comprised of board members Jim Harlan, Vice-President; Arlene Alen, Secretary; Julie Broadway, Treasurer; and Dr. Joahn Hall. Their guidance and expertise were vital to the process. We are also grateful to Amanda Madorno of Roam Consulting LLC for her skill and ability in leading us to take the big steps needed to move forward.

We appreciate the input gathered from our stakeholders through the online survey, by phone and in focus groups. You provided us with invaluable feedback and information that informed the final plan. The following report outlines our process, research, outcomes and goals, providing our roadmap for addressing the future.

We look forward to serving you by providing proven credentialing and standards for you, your business, the participants and families you serve and the equines who partner with you in your work.

Sincerely,

Handwritten signature of Kathy Alm.

Kathy Alm, Chair
Strategic Planning Committee

Handwritten signature of Kay Marsh Green.

Kay Marsh Green
Chief Executive Officer

INTRODUCTION



In July 2012, the Professional Association of Therapeutic Horsemanship International (PATH Intl.) Board of Trustees launched a comprehensive planning effort to map out the association's strategic direction for the next three to five years. This plan is the culmination of over six months of intensive work by board members, professional staff, members and community volunteers.

The planning process initiated with the Strategic Planning Committee, chaired by PATH Intl. Past President Kathy Alm and comprised of Vice President Jim Harlan; Secretary Arlene Alen; Treasurer Julie Broadway; board member Dr. Joahn Hall; and CEO Kay Marsh Green.

In September, the research phase began with data collection and analysis of a membership satisfaction survey that was distributed to all current association members. The Strategic Planning Committee also hired Roam Consulting LLC, an independent consulting firm to further facilitate the process. The consulting firm conducted personal interviews with key stakeholders and membership focus groups prior to facilitating a two-day planning retreat at the 2012 PATH Intl. Conference.

In preparation for the retreat, the board and staff uniformly educated themselves about emerging trends and future challenges for associations by reading *The Race for Relevance*. Authored by Harrison Coerver and Mary Byers, this book presents five radical changes that will energize and position associations for better performance in today's environment and that of the future. Additionally, the planning team analyzed membership feedback, current environmental research and statistical data.

Through these activities, hundreds of current members, sponsors, donors and partners provided input into identifying PATH Intl. strengths, weaknesses, challenges and opportunities. This feedback was distilled and resulted in five strategic areas the board believes to be most relevant to the association's future sustainability and health:

- ◆ Credentialing
- ◆ Community and Learning Connections
- ◆ Quality Assurance
- ◆ Organizational Capacity
- ◆ Partnerships

III.

INTRODUCTION, *cont.*



From these strategic areas, bold actions steps were developed to guide association programs and services in the following areas:

- ◆ Bring credentialing and quality assurance to a higher standard of excellence
- ◆ Deepen the member experience of connection and engagement
- ◆ Restructure governing and operational models while continuing to look for new ways to diversify financial resources
- ◆ Forge beneficial partnerships that strengthen the association

STRATEGIC OVERVIEW



PATH Intl. is internationally recognized as a premier credentialing organization for equine-assisted activities and therapies (EAAT). Founded in 1969 to promote safe and effective therapeutic horseback riding throughout the United States and Canada, the association today has 844 member centers, 7,420 individual members, of which 4,232 are credentialed professionals, providing services in countries all over the world. These members, through a variety of EAAT, change and enrich the lives of 56,036 men, women and children with special needs.

i. Mission-driven organizational accomplishments include:

- ◆ In 2009, the association integrated fully with the Equine Facilitated Mental Health Association (EFMHA) members, programs and volunteer leadership. Previously, EFMHA was a section of the association and maintained a separate committee structure and board of directors. The integration has allowed for a merging of philosophies. For the first time globally this new way of approaching the equine-assisted activities and therapies environment, in which the *whole person* is being served through partnering with the *whole horse*, will ultimately benefit more equines and humans than ever before.
- ◆ A new, modern association website with strategic architecture and design was launched in conjunction with a new enterprise database on July 12, 2010. This fresh member experience provided for member-driven, real-time contact management and an electronic membership directory. Additionally, the database replaced a dissolving records base, offering data stability, superior reporting capabilities, and for members, the ability to renew memberships online.
- ◆ In May 2011, a newly formed Industry Alliance for EAAT held its first roundtable of industry leaders. The American Quarter Horse Association and Colorado State University brought together alliance members: PATH Intl., the American Hippotherapy Association (AHA), Equine-Assisted Guiding and Learning Association (EAGALA), and the Horses and Humans Research Foundation. Goals of this alliance include:
 - Discussing the challenges facing the industry
 - Strategizing how the alliance organizations, as a united force, might better achieve recognition of EAAT by the larger public
 - Examining ways in which choosing a sustainable profession in EAAT becomes a viable career choice in an industry led by well-trained experts



- ◆ In June 2011, the association name changed to the Professional Association of Therapeutic Horsemanship International (PATH Intl.). Among other advantages, the name change helped to better reflect the diversity of disciplines in EAAT and the growing international presence. The re-branding process included developing a new tagline. Leveraging the name change increased association visibility and industry awareness in the media with more than 100 print and e-media name change-specific stories and mentions.
- ◆ In August 2011, a task force reviewed *PATH Intl. Standards for Certification and Accreditation*. Due to increased activities, new certifications and yearly additions to the manual, the time had come to reorganize the content. The reorganization facilitates the premier accredited center process, allows for growth of the industry and positions the association to retain the leadership role in providing EAAT industry standards.
- ◆ To complement the forward progress of the PATH International Equine Services for Heroes initiative, the association entered into an unprecedented partnership with Wounded Warrior Project (WWP) in March 2012. Through this partnership, PATH Intl. Premier Accredited Centers can underwrite scholarships for WWP Alumni participants. PATH Intl. coordinates and administers this process in which scholarships have been awarded to 133 veterans at more than 40 accredited centers.

ii. Identified Association Strengths

Credentialing Excellence

The 2012 membership survey respondents stated their top reason for joining PATH Intl. is to obtain certification and increase their professional credibility. PATH Intl. offers a diverse credentialing program and certifies approximately 600 new professionals and accredits 50 centers per year. Currently, the association offers the following professional certifications: three levels of riding—registered, advanced and master; three levels of driving; interactive vaulting; and a certification for the horse handler in a mental health setting titled Equine Specialist in Mental Health and Learning.

Standards for Certification and Accreditation

Certified professionals and center members voluntarily commit to comply with the field-tested standards designed to ensure excellence by promoting the highest levels of safety, ethics and efficacy. Of member survey respondents, 72% believe the standards professionalize the industry overall,



provide credibility to credentialed professionals and centers, and increase safety for participants, horses, volunteers and professionals.

Membership Growth

Since 2009, membership has grown 23%. Part of this growth is a result of integrating with EFMHA, as well as our growing international presence. The current membership now reflects participation from more than 80 foreign countries. The growth also reflects the demand for services from a growing EAAT industry.

Advocacy

PATH Intl. is a strong advocate for EAAT. The association commits resources to creating public awareness of EAAT, and the exemplary standard of excellence represented by PATH Intl. credentialed professionals and centers, to partners in the equine industry (including the American Horse Council), the medical/health and wellness community, institutions of higher learning, and the general public. Goals include educating individuals about EAAT as well as promoting the accomplishments of our certified professionals, centers and their participants.

Professional Staff and Board of Trustees

Over the years, PATH Intl. has evolved from an organization steered by volunteer committees to a professionally driven association. A staff of 18 is led by a seasoned team with expertise in the fields of association management, EAAT facility management, membership, marketing and communications, finance, education, events management, fundraising and customer service. Many of the professional staff enjoy life-long equestrian pursuits and several have an immediate family member with special needs. The association continues to work with a robust volunteer committee structure in which new initiatives are cultivated from the field and membership at large.

The 15 member PATH Intl. Board of Trustees represents a diverse group of individuals. Seven have EAAT experience either as center management or program staff. Two are volunteers at centers and one is a participant. In addition, the board has financial, medical, business, nonprofit and legal experience.

iii. Addressing the Future

Convergences of internal and external trends demand that association leaders and members reconsider how we do business. A changing membership, constantly emerging technological



advancements, new and increased competition from a variety of sources, increased demands on members' time and higher expectations for good value and a return on investment are all changing the association approach to member programs and services. To remain competitive and relevant, PATH Intl. must:

Better articulate association value to members

During the strategic planning process, the team reflected on the association mission statement, identified the association's distinctive qualities, and perhaps most important, scrutinized the value offered to members.

The adjacent "Wordle" reflects the input received from the board, staff and membership regarding the value of the association to its members. As part of the strategic plan a new value proposition was drafted. The value proposition, along with the competitive advantage, now accompanies the revised mission statement (see page 12).

Better enforce standards

PATH Intl. standards define its competitive advantage, or what sets it apart from other credentialing associations. The general public, as well as partner industries, look to PATH Intl. to uphold the quality of certified professionals and member centers. As the next step to maintaining and cultivating a greater credentialing reputation, a quality assurance program will be developed to support professionals and centers in their delivery of consistently superior services and ensure that certified professionals and member centers are meeting PATH Intl. standards.

Advance members through the credentialing process

PATH Intl. certifies a healthy number of new-to-the-industry professionals each year. However, more effort should be made to:

- ◆ Guide member centers through the accreditation process, thus increasing the number of premier accredited centers
- ◆ Promote opportunities for registered instructors (the largest population) to further their expertise by progressing through the advanced and master certification levels
- ◆ Identify opportunities for and develop new certifications (e.g., equine-facilitated learning)
- ◆ Develop guidelines for research and internship sites

STRATEGIC OVERVIEW, *cont.*



Enrich networking opportunities

In the strategic planning focus groups, there was resounding feedback that members value the support and encouragement they receive from other centers and

professionals. PATH Intl. will enrich these experiences by increasing and enriching face-to-face and electronic mentoring and networking opportunities for members and create education and training opportunities for those who want to mentor others.

Maintain a laser-like strategic focus

PATH Intl. recognizes the need to balance diverse member interests with identified association strengths. This means focusing on

credentialing programs, professional development and continuing education and developing a quality assurance program for standards.

Optimize technology

PATH Intl. technological capacity and expertise must be increased. To remain relevant and become a knowledge management resource for members, PATH Intl. needs a robust technology framework that allows for increased online offerings, learning communities and social networking.

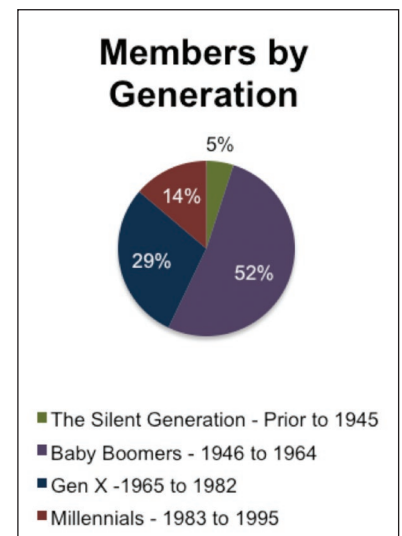
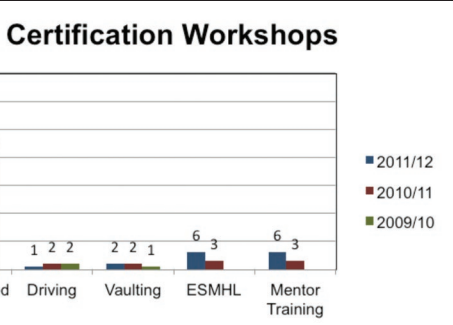
Recognize and stay abreast of changing membership demographics

PATH Intl. boasts a dedicated and loyal membership. Two hundred have been with the association for 20+ years, including some original founders!

As the following chart illustrates, 57% of our membership is comprised of individuals from the Baby Boomer and Silent Generations. In order to sustain the vitality of the association, PATH Intl. must be prepared to meet the expectations and preferences of the next generation of members.

This next generation of members:

- ◆ Are socially networked and technologically savvy
- ◆ Have less time and more demands on their schedules
- ◆ Want involvement that is meaningful, interesting and enjoyable
- ◆ Look for ideas that help them perform their work



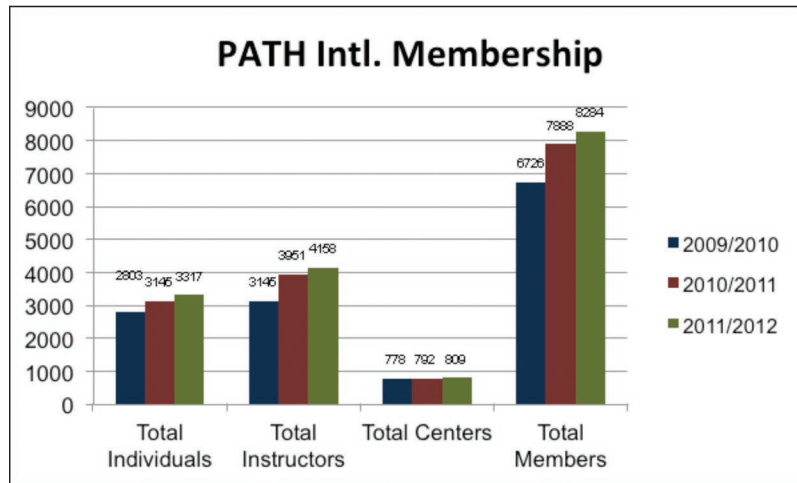
STRATEGIC OVERVIEW, *cont.*



Today, current and prospective members have a wider range of choices for credentialing and professional and continuing education opportunities. Educational offerings are increasingly more targeted, easily accessible online and technology driven. PATH Intl. faces increasing competition from all sources including:

- ◆ independent providers
- ◆ institutions of higher learning
- ◆ new associations
- ◆ those who eschew any credentialing at all

This changing competitive environment presents new partnership development opportunities with health and wellness, higher education and other organizations to improve educational offerings to members.



IV.

MISSION, COMPETITIVE ADVANTAGE, VALUE PROPOSITION



PATH Intl. Mission

The Professional Association of Therapeutic Horsemanship International (PATH Intl.) promotes safety and optimal outcomes in equine-assisted activities and therapies for individuals with special needs.

PATH Intl. Competitive Advantage

Our tested and proven credentialing and standards promote peace of mind for you and your center, the participants and families and the equines who partner with you in your work.

PATH Intl. Value Proposition

PATH Intl. is a thriving community of dedicated professionals who seek and promote credentialing, learning and mentoring to advance the practice of equine-assisted activities and therapies.

- ◆ Our rigorous credentialing program enhances the professional credibility of PATH Intl. professionals and centers.
- ◆ We offer exceptional learning experiences and share our knowledge with the profession.
- ◆ We connect professionals and centers to the relationships, resources and tools they need.
- ◆ We collaborate both inside and outside our industry to advocate for recognition and advancement.

2013 STRATEGIC PLAN GOALS AND OBJECTIVES



Strategic Direction:

Our potential will be realized when PATH Intl. is recognized as the premier credentialing organization for EAAT.

Credentialing

Goal 1: *We are recognized by the EAAT industry, health and wellness community and the public for our excellent and rigorous credentialing in order to enhance the professional credibility of individuals and centers.*

Objective 1: Become an accredited credentialing program that validates the quality of our standards, certifications and accreditation.

Objective 2: Evolve to meet the credentialing needs of the industry.

Objective 3: Increase value of credentialing programs that result in highly trained certified professionals and accredited centers credentialed by PATH Intl.

Objective 4: Increase value of advancing through credentialing programs that result in a successful career path and a sustainable business.

Continuing Education and Knowledge Management

Goal 2: *In order to promote professionalism and support sustainability of EAAT, PATH Intl. connects members to resources, information and networks.*

Objective 1: Every member has access to information, resources and networks in order to feel community, support and connection and strengthen the EAAT industry.

Objective 2: Identify and promote internal and external educational opportunities that support PATH Intl standards that result in highly trained EAAT professionals and excellent service delivery.

Objective 3: Create partnerships with higher education for credentialing through PATH Intl. in order to cultivate future generations of highly trained EAAT professionals.



Quality Assurance

Goal 3: *Our quality assurance program enables instructors and centers to deliver safe, superior services and programs.*

- Objective 1: Develop and implement a quality assurance program that enforces credentialing standards in order to promote industry safety and optimal outcomes.
- Objective 2: Communicate the value of a quality assurance program so that internal and external consumers recognize the professionalism & excellence of PATH Intl. standards, certifications & accreditations.

Capacity Building

Goal 4: *Our organizational systems and people power enable us to meet our strategic goals.*

- Objective 1: Re-structure board and committees in order to streamline and align with current and evolving needs of the membership and association.
- Objective 2: Invest in technology to allow the association to be proactive with the delivery of services.
- Objective 3: Restructure regional systems to support strategic plan.
- Objective 4: Re-tool the association's revenue stream and business model in order to ensure organizational health that supports current strategic goals.

Community Engagement and Partnerships

Goal 5: *Build strategic relationships and communication efforts to support partnerships, alliances and brand awareness.*

- Objective 1: Re-brand and promote PATH Intl. to be recognized as the premier credentialing organization for EAAT.
- Objective 2: Identify and align with key organizations in order to educate them on the importance of PATH Intl. credentialing requirements.



The Professional Association of Therapeutic Horsemanship International Board of Trustees and Staff are committed to the vision of this strategic plan and thank everyone involved in this important project that charts the future for the organization.

Submitted by the PATH Intl. Board of Trustees:

President: Jody Enget

Vice President: Jim Harlan

Secretary: Arlene Alen

Treasurer: Julie Broadway

Past President: Kathy Alm

Jeff Beck, Ross Braun, Holly Schmitt Fox, Tom Graf, Joahn Hall, Miyako Kinoshita, Allyn Mann, Jon Nelson, Carlene Taylor, Tom Winsor

Coordinated by the PATH Intl. Strategic Planning Committee:

Chair: Kathy Alm

Arlene Alen, Julie Broadway, Joahn Hall, Jim Harlan, PATH Intl. CEO Kay Marsh Green

PATH Intl. Staff:

Kay Marsh Green

Sam Albrecht, Jaime Covington, Denise Fager, Megan Ferry, Carrie Garnett, Rachel Johnston, Jeff Kelling, Carolyn Malcheski, Kaye Marks, Margo Parks, Karen Province, Beverly Reed, Cher Smith, Peggy Smith, Jorian Stuckey, Amanda Walters

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