



Do you know where you are going?

One Page Strategic Plan

Agloe, NY

•Do you know where you are going?

•Does it even exist?



Vision/Mission Statement

Crafting an Inspiring Vision

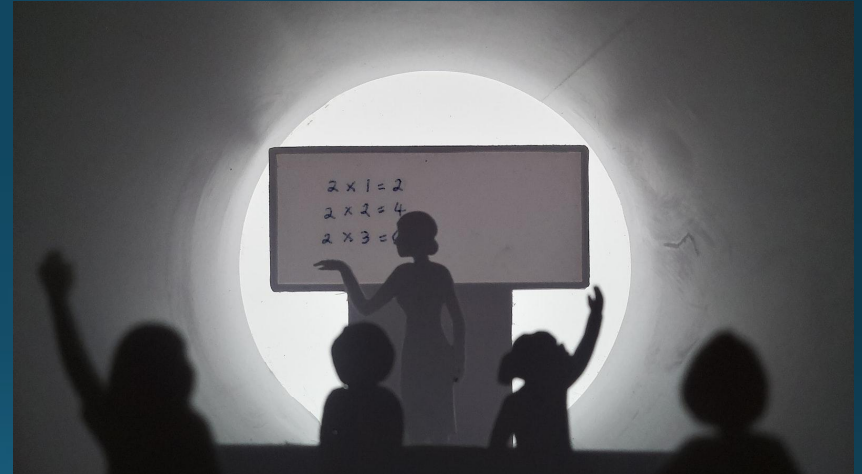
- Take your time
- Include all stakeholders
- Needs to be impactful & memorable
- Short is better
- Forward looking
- Wordsmithing is the last step not the first

To create a community where horses help people with disabilities and challenges live their best life!

Core Values

Guiding Principles

- Example Core Values* * :
 - **Integrity:** We act with honesty, transparency, and ethical behavior.
 - **Innovation:** We embrace creativity and continuous improvement.
 - **Collaboration:** We foster teamwork and open communication.
 - **Customer Focus:** We prioritize customer satisfaction and success.



SWOT Analysis

Assessing Strengths, Weaknesses, Opportunities, and Threats



Strengths: Internal factors that give the company a competitive advantage.



Weaknesses: Internal factors that hinder the company's performance.



Opportunities: External factors that can be leveraged for growth.



Threats: External factors that pose risks to the company's success.

Strategic Intent

What are your big buckets?

- Most Important things you can do to make your vision a reality
- Think 50,000 ft view what's happening at you center
- These rarely if ever change
- Limit yourself to 2 or 3
- This is just the beginning

Financial Stability and Growth

Program & Operations Excellence

Strengthen Infrastructure

Strategies Initiatives



Strategies:
High-level plans
to achieve goals
and objectives.



We are now at
the 10,000 ft
view



These answer
the how we are
going to fill our
big buckets



What are the
best goals we
can set today



These may
change at every
review or if an
initiative is
failing

Improve donor & grant cultivation and
stewardship leading to growth in major gifts

Build a reserve fund equal to 3 months budgeted
SIRE Expenses

Increase SIRE visibility and awareness in
important communities and markets

Maintain and enhance excellence through staff
and equine development.

Demonstrate and improve program success
through quantitative and qualitative assessment
program and research to assure that each site and
program is optimally capacitized

Explore strategic partnerships to leverage
resources and opportunities.

Operate at two excellent facilities

Create Equine & Maintenance Reserve

Exploit technology to improve all areas of
service

Pay off all Debt

Key Performance Indicators (KPIs)

Measuring Progress and Success

- How can we measure the success of our strategic Intentions?
- We are finally at ground level
- You can measure intangibles with a proxy
- Create Champions to guide progress

Increase Major Gifts Revenue by 5% annually

Track donor cultivation to assure that each major donor has 2 significant "touches" yearly beginning FY 2020

Offer bi-monthly experiential riding experience.
Plan done by 12/31/19

By 6/30/21 engage additional Development Staff

Implement herd succession and utilization program using industry best-practices. Plan by FY 2023

Competitive Compensation plan by FY 2022

Implement "full staffing model" by FY 2023

All staff are happy and friendly toward clients, volunteers, and guests (smile count)

Establish 5 partnerships by 12/2024

Organize Asset Committee by 6/30/22 to access and prioritize list of Capital Needs

Equine Management System by 7/24

Move all servers, phones, files, and databases to cloud by 6/21
All forms electronically signed by 8/23

Finance Committee to create plan for funding maintenance and Equine needs by 1/2020

Allocate resources strategically: Prioritize resources based on goals and objectives.

Leverage technology and automation: Use tools and systems to streamline processes.

Invest in employee development: Provide training and support for skill enhancement.

Monitor resource utilization: Regularly assess resource allocation and make adjustments.

Resource Allocation

Monitoring and Evaluation

Tracking Progress and Making Adjustments

- **Establish monitoring mechanisms:** Define how progress will be tracked and measured.
- **Regularly review performance:** Assess progress towards goals and objectives.
The Strategic Plan is not important unless the board reviews progress at every meeting
- **Analyze data and insights:** Use data to identify trends, patterns, and areas for improvement.
- **Make informed decisions:** Use insights to make data-driven decisions and adjustments.
- **Maintain your course:** Overcome the temptation to adjust the plan more than once per year
 - **Annual Review:** Staff and Board collaborate to make adjustments to Initiatives and Intents
 - **Five Year Review:** Do our Strategic Intents still align with our vision and needs?

Conclusion

- The One Page Strategic Plan provides a clear and concise overview of a company's goals and objectives.
- A well-crafted vision statement, mission statement, and core values are essential for guiding the organization.
- Conducting a SWOT analysis helps identify strengths, weaknesses, opportunities, and threats.
- Tracking KPIs, creating an action plan, and allocating resources effectively are crucial for implementation.
- Monitoring progress, evaluating performance, and making adjustments ensure continuous improvement.

