

Creating a Business Development Plan for the Equine Program

Getting the Most out of Grants,
Fundraising & Partnerships



Thank you for making Therapeutic Riding accessible in your community.

As an exciting and effective therapeutic intervention, studies show clients experience increased joy, cognition, physical strength & coordination.

Providing this powerful therapy is no easy job. Challenges from financial, geographic, environmental & human resources factors can be daunting.

Jennifer Mathis
CHA Equine Facilities Management Level 4
PATH Certified Riding and Driving Instructor
for Disabilities
Certified Barefoot Trimmer

Enjoyed horses as a child trail riding in Missouri. At 18, began driving for tourism in downtown Kansas City as a certified carriage driver and later in Ft. Worth, Dallas & Frisco. Started Equine Assisted Therapy and Barefoot Trimming in Texas in 2010. Currently the Therapeutic Riding & Driving Program Director for Brandon Clinton Sport Horses. Bachelor's in Business Administration from University of North Texas. Director for grants and fundraising for the past 12 years, developing programs for Equine and non-Equine non-profits.



File for an IRS Designation

IRS Non-Profit Designation 501c3:

This is the most common type of nonprofit organization: religious, educational, charitable, scientific, and literary; groups that test for public safety, that foster national or international amateur sports competition; or organizations engaged in the prevention of cruelty to children or animals. Apply for status using IRS form 1023, and files annually Form 990, 990EZ, or 990-PF. Contributions are usually tax-exempt.

IRS Not for Profit Designation 501c7:

Section 501(c)(7) of the Internal Revenue Code grants tax-exempt status to some clubs organized as not-for-profit entities and operated for the enjoyment or recreation of their members: fraternities, sororities, country clubs, dinner clubs, amateur sport clubs, yacht clubs and hobby clubs. The chief benefit for a 501(c)(7) tax-exempt club is that it does not pay federal taxes on its day-to-day activities, but there are other advantages as well. Apply using IRS form 1024 and file annually the 990 or 990EZ.

IRS Hotline: 1-800-829-1040

Legalzoom.com has many answers to your tax questions

Researching Funding Opportunities

- Google: search terms
- Google Maps: who are your neighbors?
- Foundation Directory via PATH Int'l Membership
- Tips from Volunteers and Friends
- Outreach via Social Media and Website
- Cold Calls and Phone Calls

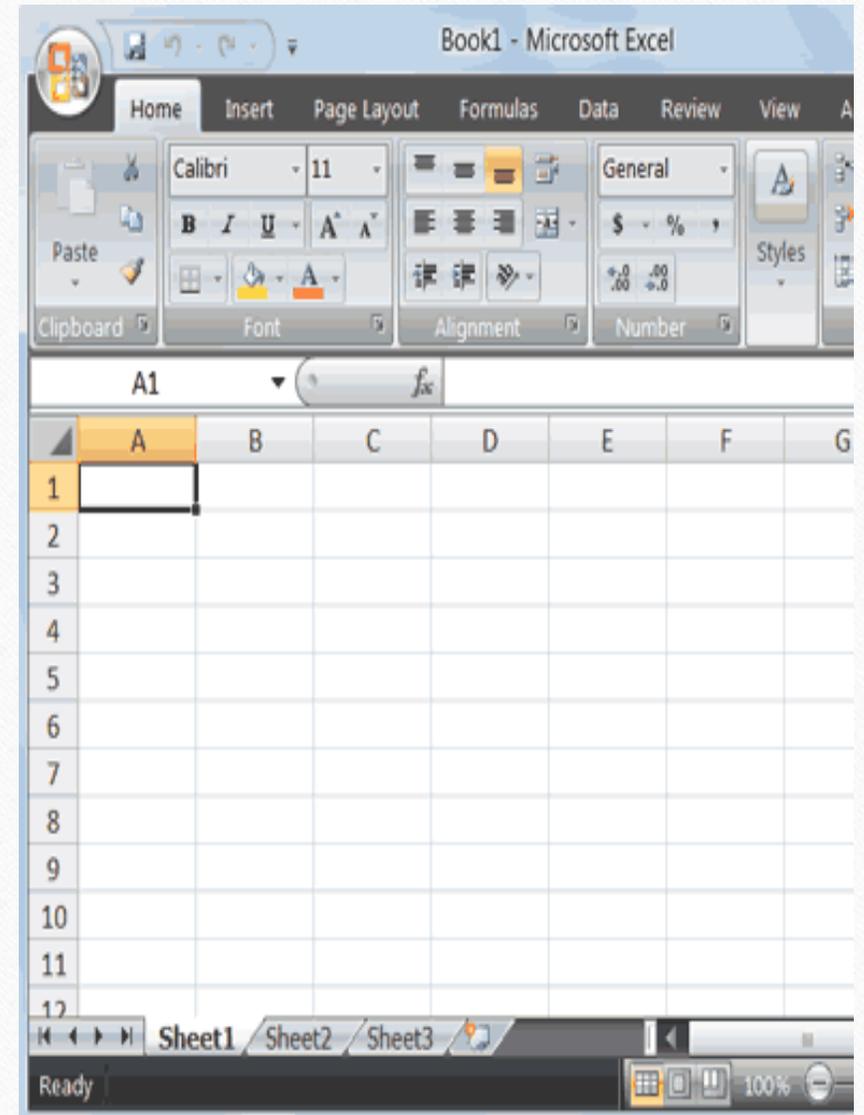


Stay Organized

Excel is easy to use and can be uploaded into Salesforce and most sales tools. Sharing Google sheets & docs allows you to delegate research to interns and assistants, check their work in real-time & log hours.

Important details such as:

- criteria
- deadlines
- contact info
- application procedures
- correspondence history
- donation history





Creating a request letter



- Introduces your organization
- provides the history, accomplishments and service
- substantiates the need in the community for your services
- Explains the project request for help (volunteers/funding)

A request letter on a letterhead with your organization's history, service, collaborations (partnerships) and goals with sections that can be modified for each specific request will help streamline the grant writing process.

It is key to know what the *funder's interests* are *and how much they give*. **Often NP's ask too low and miss out on thousands of additional dollars.**



Be sure to thank them for all the good they do in your community!



Your Request Letter Format

- Keep your letter simple with clean writing.
- Ask friends, peers and family to give feedback. The more unfamiliar they are with the equestrian world the better. They'll ask you to explain concepts in basic terms.
- Use a letterhead with logo to polish the look of the request.

It's EASY! Just answer these questions:

1. What is our mission? What do we do?
2. What inspired us to start our organization?
3. Who do we serve?
4. Where are we located and how is that beneficial to our community?
5. What have we accomplished?
6. Who has helped us and who are our partners in serving the community?
7. What does an average day of service look like?
8. What do we need to serve our clients better?
9. What are our future goals?

Grant Attachments

Finish your letter with documents called attachments. Grant attachments are the supporting documents that substantiate your organization's credibility.

- Tax determination letter from IRS provides proof of status (501 type)
- Board Member Bios
- Key Staff Bios
- Organization & Project Budget
- Balance Sheet
- Income/Expense statement
- Form 990
- Project Budget Narrative
- Testimonies from Clients

BUDGETS

Budgets tell the most important story about your non-profit and should be presented in a clear, descriptive manner. Show the funder that you can be trusted with more funding.

Projects should show the true costs of implementation and include administrative and facility expenses. It's often the hidden costs that cause an Equine Program to struggle. If these expenses are declared to the funder in the budgets as part of the service cost, then we adhere to accounting due diligence.

The use of departmental budgets allows the donation to be used appropriately to cover the costs of each lesson. There are 3 consistent elements to providing a lesson:

- Horse
- Facility
- Instructor/Counselor

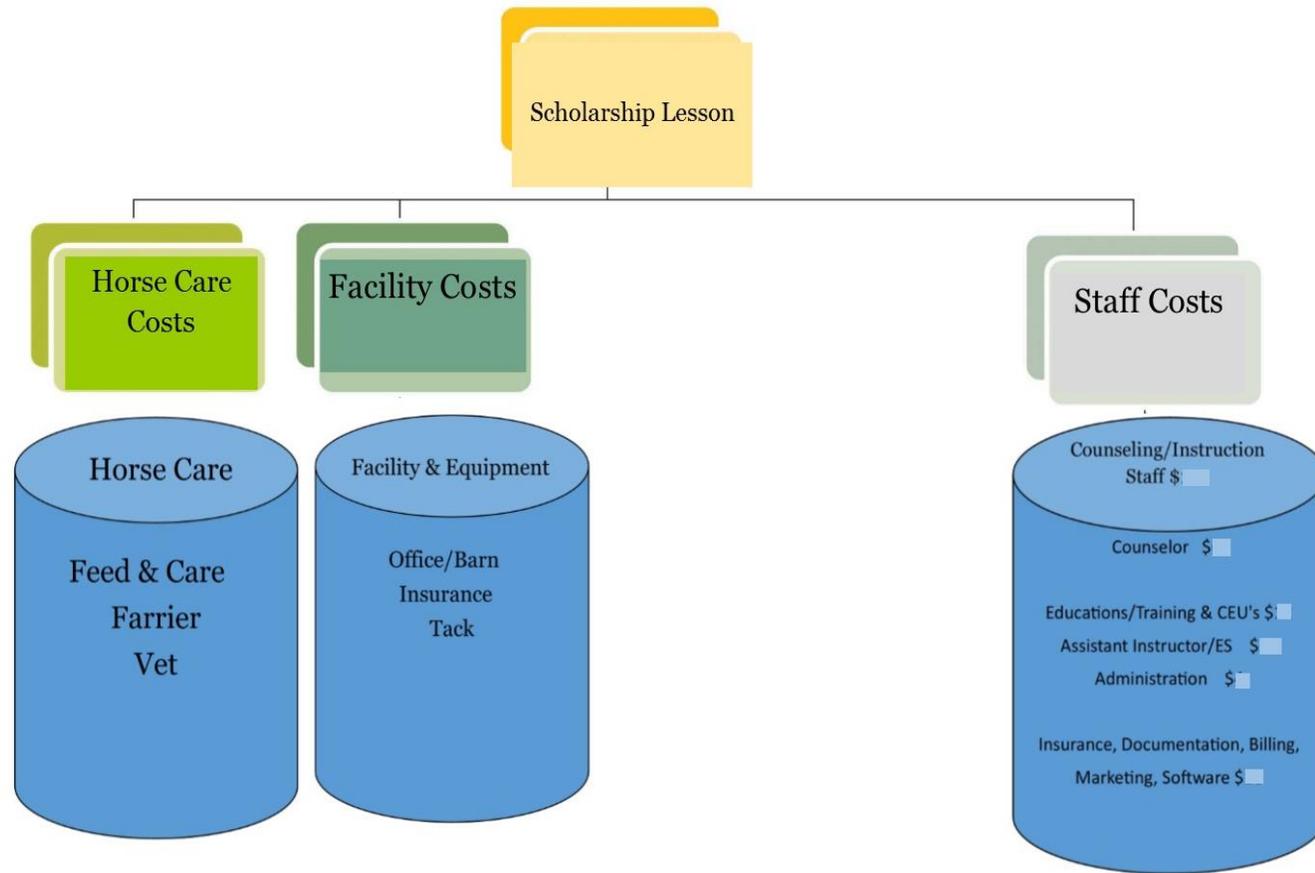
The Formula for a Scholarship Lesson

Every lesson, ride or interaction with a client costs your organization _____.

Horse Care Costs + Facility Costs + Staff Costs = Program Service Cost.

Each lesson requires 2 hours total for 1 hour of service: ½ hour setup beforehand and ½ hour wrap up. So factor in the 2 hours for your instructor, horse and volunteers.

Do not let the industry drive down your prices and push you to dangerously low profit margins.



Equine Care Specialist

A trained Equine Care Specialist (ECS) is necessary to the health of the herd. The ECS can tell that a horse is experiencing colic and begin treatment. This skill can save a NP thousands of dollars in colic surgery and vet bills.

The ECS's salary should be added to the Horse Care budget. Horse care can be 24/7 especially if illness strikes the herd. This helps funders understand that horse care costs are a major expense.

Horse training is added to the Horse Care budget due to EAT being a specific skill set that requires training.



Testimonials

Letters from parents and supporters appeal to the compassionate side of the supporter and should be well written, compelling and include pictures.



Be Ready to Ask



Have a clear request letter ready for staff and volunteers to use for requests:

- Focus on the most important projects/items you need for your program
- Clearly describe the needs of your organization in newsletters, bulletin boards in meeting rooms, website and social media.
- ASKing is the key: **All Should Know**
- Who should you tell about the good your organization is doing in the community? Everyone.

Corporate Volunteer Partnerships provide...

Grants, matching gifts, capital projects, volunteers and donations. The Volunteer Coordinator (VC) can generate \$ if trained to generate leads, cultivate relationships, manage a database, maximize opportunities and direct volunteer projects. Every volunteer has access to funding, capital, skills and much needed supplies, or knows someone who does. Interview each volunteer to find out:

- Who is their employer? Are they members of clubs, civic or church groups?
- Does their company have matching grants or a corporate volunteer day?
- What skills does this volunteer have that makes them unique?

Once the contact is made, invitation emails/letters go to the contact person who can arrange the corporate volunteer day and project finalization and date of workday begins.



Community Service Volunteers (CSV) are a tremendous resource and their potential can be maximized through careful interviewing. Many CSV's are DUI cases, are business owners and professionals, and have a vast network of valuable contacts.



Once the CSV is accepted as a volunteer, passing scrutiny by the VC, they should be assigned jobs appropriate to their skillset. If they have a strong IT background, they can assist the Grant Coordinator in Grant research. If they have a marketing or sales skillset, they can help with corporate contact cultivation. A professional should not be mucking stalls, but rather, be helping you further your fundraising goals. Manual labor would be more appropriate for an unskilled worker.

Through the use of Google docs you can manage the research of several volunteers in real time and log their hours, then report to the VC for her verification.

Fundraising & Special Events:

3 priorities:

- New partners in the community
- Showcase your program
- Volunteer involvement

- Keep costs low through underwriting & sponsorship. Online fundraisers have become very successful with low expense.

- Sponsors must be honored through website, social media, banner placement and brochure.

- Create sponsorship packages unique to each sponsor.



Social Media goals: 3 posts daily

T- Thank (Thank a volunteer, donor or group)

R- Request (Request help for volunteers/donations/\$)

U- Update (Updates include rider accomplishments, program goals, events, facts about Equine Therapy, bios of staff and horses...)

Use pictures of riders, horses and informative context.



Photos & Video

Tips for photo and video:

- Perspective from eye level of the horse and same for the child.
- Natural, un-staged, candid shots conveying positive emotions are best.
- Lots of action with fun activities, challenge courses, obstacles and games.
- Independent riding
- Safety check for helmet position, heels down, proper basic technique before publishing.
- Get help from parents, students and volunteers.

Summary

- Build foundation, corporate and civic contacts for funding in databases.
- Create request materials appropriate for each funder.
- Use the grant and volunteer databases to meet grant deadlines, keep contacts and opportunities organized.
- Hone in on volunteer skillsets & appropriate matching of volunteers with tasks, create volunteer workday projects and host site tours.
- Use CSV to assist in grant & corporate research, and funding when applicable.
- Host corporate and civic volunteer workdays to solidify partnerships within the community, provide promotional ops for marketing and improve facility.
- Increase use of video and photo vignettes to compel donors and supporters and increase social media presence.
- Ensure special events are valuable.
- Provide services that exceed expectation and support the Special Needs Community.

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