

# Maryland Therapeutic Riding Strategic Plan Report

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## MESSAGE FROM THE CHAIRMAN OF THE BOARD

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As Maryland Therapeutic Riding, Inc.'s (MTR) Chairman of the Board, I am excited to present our Strategic Plan for the next three years. I believe it represents a bold statement about our values as an organization and our commitment to providing outstanding service to our community well into the future. It serves as a clear picture of what we hope for ourselves as we implement it through 2022.

I must thank the many dedicated employees, board members, and volunteers for their time, insight and passion toward developing this plan. Together we took a long, hard look at our organization's strengths and the opportunities for growth and improvement. It is a true privilege to be involved in an effort like this with such talented and committed people.

At MTR, we are justifiably proud of the work we do daily with some of the communities most vulnerable and inspiring individuals with special needs and their families. We have witnessed firsthand the positive impact, both physical and emotional, that our services provide. These successes invigorate us to continue our work to improve the lives of individuals through varied and meaningful equine programs. While we do this, we strive to have greater understanding, foster broader acceptance, and to celebrate the many achievements in the lives of the people we serve.

In developing this plan, we did not hesitate to look for opportunities for improvement at MTR. Our goal is to be the best version of ourselves and that requires analysis and review. The full potential of our organization will only be realized by periodically taking stock of where we have been and what we aspire to be.

I invite you to read through our Strategic Plan, which is our blueprint for a three-year journey. As you get to know it, I hope you will find in it the inspiration and vision that comes from the opportunity to make a difference.

Thank you. I look forward to hearing from you, answering and learning from your questions, and seeing this ambitious plan unfold!

Sincerely,

Kerry Fairweather  
Chairman of the Board



## EXECUTIVE SUMMARY

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The MTR Strategic Plan identifies a vision to work towards over the next three years. The Strategic Plan outlines five Strategic Goals supported by fifteen Strategic Objectives that represent the changes that we have committed to implement and integrate into our operations to achieve our vision. The five goals we have chosen will improve MTR's ability to deliver our mission and build upon MTR's core strengths to expand opportunities and partnerships, increase resources, and improve existing practices. We recognize that our success demands that we engage the extended MTR community to embrace these shared priorities.

### **Strategic Goal 1: Establish an Inspiring Culture that Reflects a Collaborative Team Working Towards Standards of Excellence**

Our community is our strongest asset. We will dive deeper into the fundamental beliefs of this community by codifying, communicating, and living the core values that represent who we are. MTR leadership will champion a culture of transparency, consistency, and trust that nurtures and inspires our staff and stakeholders.

### **Strategic Goal 2: Create Clearly Defined, Optimized, and Self-sustaining Programs that Meet the Needs of Our Partners**

Our herd is the foundation of our programs. Maximizing herd capacity and optimizing horse usage for each program will allow for growth and expansion that will meet the needs of our community. We will continue to grow as an educational organization and develop opportunities and incentives for continued professional development for all MTR staff. To maximize facility use, we will organize a wellness network of strategic partners to extend the reach of our programs to provide activities that do not require horse usage.

### **Strategic Goal 3: Maintain a Firm Commitment to Fiscal Integrity and Strengthen MTR's Financial Security by Maximizing Current Programs and Partnerships**

Our future demands financial sustainability. MTR commits to fiscal integrity and the strengthening of MTR's financial security by maximizing current programs and partnerships and assuring the most efficient use of all of MTR's resources including the maximization of MTR's facility to create new revenue streams. We will also lessen our debt load by refinancing our property with the result of maximizing the value of our equity while assuring the maintenance of affordable debt.

### **Strategic Goal 4: Increase Voluntary Giving to Contribute to Financial Stability, Sustain Current Programs, and Enable Additional Programs and Services.**

Our donors are critical to our success. As MTR continues to grow as an organization, sufficient funds will need to be raised through voluntary giving to sustain current programs, contribute to the financial stability of MTR, and provide fiscal flexibility to create





additional programs and services. We will be proactive in donor cultivation and retention programs as we build upon our current grant connections and foundations. Contributions of stakeholders will be nurtured and celebrated as MTR moves forward.

**Strategic Goal 5: Ensure that Materials, Equipment, and Buildings are Up-to-Date, Efficient and User-Friendly in Order to Meet the Service Goals of MTR.**

Our operations require reliable infrastructure. MTR will establish a sustainable, secure, and reliable physical and IT Infrastructure that supports a positive experience. Leadership will also develop a green site master plan for future MTR expansion to include current and future incremental upgrades and improvements.



## STRATEGIC PLANNING PROCESS

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The Strategic Planning Committee (the "Team") comprised of Board Members, staff, and volunteers collaborated over several months to apply a structured approach based on industry best practices to develop a practical and actionable strategic plan based on facts, data, and aspirations for the future of MTR. This process included a full day retreat, facilitated by an external expert, and a series of structured working sessions to iterate and refine the plan. The Team followed a repeatable process that included:

1. Assessing the internal and external factors and the operational constraints and challenges that need to be addressed to enable MTR to fulfill our stated mission.
2. Refreshing the Mission, Vision, three-year Strategy Statement, and Core Values that will guide planning and implementation.
3. Focusing on the core capabilities of Leadership, Finance, Programs, Development, and Infrastructure, we framed alternatives and prioritized those goals and objectives on which the strategy will focus.

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**"Every effective winning strategy is mapped out by focusing on the desired end goal."**  
Wayne Chirisa

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Following the approval of this Strategic Plan, the Team will develop functional action plans and measures to clearly define how our goals and objectives will be achieved. These plans will itemize the steps that must be accomplished and capabilities built or expanded to achieve the target state with sufficient detail to be readily measured for progress toward completion. Each action plan will be led by a Team member with clear ownership and accountability to its successful completion.

The Team, along with guidance from the Board will periodically assess both the action plans and objectives to validate them against progress, changes to our internal and external landscapes, and other critical factors that impact our people, stakeholders, or operations.



## THE CASE FOR CHANGE

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While the environment in which MTR operates may be challenging, we believe that there also exist opportunities for growth and improvement in our core mission. We assessed this environment through the lens of our ability to attract and retain stakeholders: donors, staff, volunteers, and clients within our geographic area.

**Donors:** There continues to exist fierce competition for donors and benefactors. As tax laws change to allow more people to utilize a standard deduction rather than to itemize based on income, we may see the overall size and number of contributions decline. However, this change should have less impact on our donors, both small and large, as our smaller donors are already using the standard deduction; and expected changes to the income threshold will result in our larger donors continuing to itemize. In either case, we must demonstrate the value of MTR's services and mission to encourage donors to select MTR as their primary beneficiary so that future changes to tax law or negative economic landscapes will lessen any negative impact. One opportunity to create this is through continually demonstrating our fiscal strength and stewardship thereby securing MTR as a premier charitable investment.

**Staff:** Staff, therapists, and volunteers who choose to work with MTR do so because of a strong belief and commitment to the mission. However, our ability to meet compensation demands in an increasingly expensive cost of living area and a desire for a clear career path should not be overlooked. By strengthening our business functions, we add value to the individuals by administering our resources more efficiently. By providing a learning culture where they can support this mission and grow their skills and career, we can attract, nurture, and retain top-quality people.

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**"Teamwork is what MTR is all about, from early in the morning to later in the day, our horses, our riders, our volunteers and our hard-working staff are united in an extraordinary team with the common goal of caring for each other in pursuit of our mission."**

Richard Mosher, Volunteer

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**Clients:** The need for MTR's services continues to grow and we can expect this trend to continue especially with the broadening of our military and veteran community programs. While there are competing therapeutic riding programs across the DC/Baltimore metro areas, we do not see these as attracting potential MTR clients. The distinction is between clients who require financial support and those that do not. Our ability to grow and service these clients and families who require financial support is directly tied to our ability to maintain our financial strength and reputation.

In these next three years, MTR will seek to be increasingly intentional in our partnerships and relationships. This will enable us to better understand our environment and to better prepare ourselves to take advantage of opportunities and to mitigate risks.



## WHAT GUIDES US

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### Mission Statement

To improve the quality of life of children, adults, active military and veterans with special needs by connecting humans and horses in a healing environment.

### Vision Statement

MTR will provide life-changing experiences that empower the mind, strengthen the body, and lift the spirit.

### Strategy Statement

By 2022, MTR will be recognized as the premier therapeutic riding organization in the Mid-Atlantic region for its standards of excellence, highly trained and motivated professionals and volunteers, financial sustainability, and culture of healing.

### Core Values

Acceptance: Creating a culture of safety, warmth, and belonging where everyone is accepted unconditionally.

Hope: Believing in the value of hope and infinite possibility.

Respect: Being present, connecting with transparency, dignity, and respect.

Service: Delivering exceptional services in all we do and ensuring continual education for all involved.

Teamwork: Energizing our efforts through teamwork and collaboration yielding greater results.

Performance: Being performance driven through the lens of humanity ensuring all actions further our mission.



## OUR STRATEGY

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The Strategic Plan outlines five Strategic Goals supported by 15 Strategic Objectives that represent the changes that we have committed to implement and integrate into our operations to achieve our vision.

**Goal 1: Establish an inspiring culture that reflects a collaborative team working towards standards of excellence.**

- 1.1:** Create Core Values
- 1.2:** Increase transparency
- 1.3:** Nurture and inspire internal stakeholders

**Goal 2: Create clearly defined, optimized, and self-sustaining programs that meet the needs of our partners.**

- 2.1:** Maintain and expand optimal partnerships
- 2.2:** Maintain status and grow as an educational organization
- 2.3:** Enhance and expand upon program services

**Goal 3: Maintain a firm commitment to fiscal integrity and strengthen MTR's financial security by maximizing current programs and partnerships.**

- 3.1:** Manage cash flow and investments efficiently and effectively
- 3.2:** Increase effectiveness and timeliness of financial reporting and transparency to outside constituencies such as clients, donors, and government.

**Goal 4: Increase voluntary giving to contribute to financial stability, sustain current programs, and enable additional programs and services.**

- 4.1:** Determine funding requirements to achieve financial stability
- 4.2:** Maintain and grow current partnerships and access to untapped support and resources in our community
- 4.3:** Increase operational funding by 25% by 2022

**Goal 5: Ensure that materials, equipment, and buildings are up-to-date, efficient and user-friendly to meet the service goals of MTR.**

- 5.1:** Create a plan to update and sustain a functional and modern IT platform
- 5.2:** Develop a green site master plan for future MTR expansion to include current and future incremental upgrades and improvements.
- 5.3:** Update Arenas
- 5.4:** General Maintenance





## MEASURING AND ACHIEVING SUCCESS

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The goals and objectives within this Strategic Plan must drive our actions and collective mindset going forward. To ensure that we move closer to making our vision a reality, we have identified specific actions that must be taken to achieve these goals.

Following the Board's endorsement of the five Strategic Goals, MTR's Strategic Planning Committee will develop detailed action plans with measurable milestones to result in fulfilling the plan in full by December 2022.

We have named a leader to sponsor each goal who will be responsible for all implementation efforts associated with that goal. They will engage staff, other Board members, and volunteers where appropriate to support completion of subordinate actions and successfully deliver on this plan. Additionally, we will implement governance and reporting processes and tools, such as dashboards, to guide our strategy management by enabling timely decisions to be made at the appropriate levels.

As our organization and the operating environment evolve, how we define success in meeting these initiatives will likely change as well. We must develop performance indicators that reflect successful strategy implementation and regularly review and adjust these indicators to reflect the growth happening within MTR.

Finally, we must consistently revisit the strategy itself over the coming years. Success in making our vision and strategy a reality will enable us to build upon our success and set even more aspirational goals and objectives.



## OUR PROGRAMS

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MTR is proud to be a Professional Association of Therapeutic Horsemanship, International (PATH) Premier Accredited Center since 2002. PATH is the credentialing organization that certifies instructors and accredits centers according to a set of field-tested standards designed to ensure the highest levels of safety, ethics and effectiveness in the industry.



### THERAPEUTIC RIDING



The Therapeutic Riding program is designed to teach individuals with physical, cognitive, or emotional challenges the skills necessary to ride a horse as well as the skills necessary to appropriately groom and tack a horse in preparation for riding. Skills taught will vary depending on the client. Therapeutic Riding lessons are offered during all sessions and are taught by PATH Certified therapeutic riding instructors.

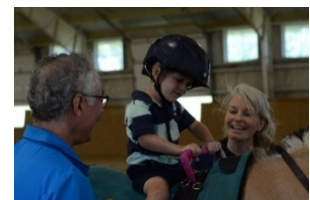
MTR considers the characteristics, age, riding level, and goals of all participants and will determine whether participants will be in a group or private lesson when scheduling. The maximum class size is three clients. Private lessons are 45 minutes in length and group lessons are 55 minutes in length.

### EQUINE LEARNING

MTR offers unmounted horsemanship lessons to any individual interested in learning skills related to horse health and care, horse handling, barn maintenance, and equine body language. This program allows participants to form a unique bond with the horse by learning how to communicate and work with the horse on the ground.

### HIPPOTHERAPY

The Hippotherapy Program offers private occupational, physical, and speech therapy sessions with trained and licensed therapists. In this unique form of rehabilitation, therapists utilize the horse and the horse's movement in conjunction with traditional therapy techniques to improve functional outcomes. The horse is a wonderful motivator, and clients are usually very responsive in this type of treatment setting.



- Occupational Therapy is designed for individuals who wish to improve motor control, balance, attention to task, problem solving skills, cognition, and sensory processing.



- Physical Therapy is designed for individuals who wish to increase their balance, strength, endurance, and flexibility and improve their gross motor and mobility skills.
- Speech Therapy is designed for individuals who wish to improve speech and language communication through augmentative communication, sign language, and verbal modalities.

## EQUINE FACILITATED PSYCHOTHERAPY



While benefits of Equine Assisted Activities overlap the physical, mental, and emotional realms, the Equine Facilitated Psychotherapy (EFP) program formats specifically target people with mental and emotional health issues. Horses provide reflective opportunities that can be utilized to meet individual, couple, or families' treatment goals. EFP is defined as a form of experiential psychotherapy that includes equine(s). EFP is also defined as an interactive process in which a licensed mental health professional, working with an appropriately credentialed equine professional, partners with suitable equine(s) to address psychotherapy goals set forth by the mental health professional and the client.

EFP may include, but is not limited to, a number of mutually beneficial equine activities such as handling, grooming, longeing, and/or riding. EFP is a treatment approach within the classification of Equine Assisted Therapy that provides the client with opportunities to enhance self-awareness and re-pattern maladaptive behaviors, feelings, and attitudes. EFP both promotes personal exploration of feelings and behaviors and allows for clinical interpretation of feelings and behaviors. EFP denotes an ongoing therapeutic relationship with clearly established treatment goals and objectives developed by the therapist in conjunction with the client. The therapist must be an appropriately credentialed mental health professional to legally practice psychotherapy. In addition to the therapist, a certified PATH Equine Specialist in Mental Health in Learning Equine Facilitated Psychotherapy may be used for people with psycho-social issues and mental health needs that result in any significant variation in cognition, mood, judgment, insight, anxiety level, perception, social skills, communication, behavior, or learning. Examples include but are not limited to:

- Anxiety Disorders
- Psychotic Disorders
- Mood Disorders
- Behavioral Difficulties

Other Mental Illness, such as Schizophrenia, Attention Deficit Hyperactivity Disorder, Autism, Receptive or Expressive Language Disorders, Personality Disorders, Depression, Post-Traumatic Stress Disorder, etc., and Major Life Changes such as environmental trauma, divorce, grief, and loss, etc. may also benefit from these services.



## OUR IMPACT

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The impact of our programs is unique to each rider. However, the following testimonials are just a few that we have received from riders and their families.

1. "MTR's mission to serve those with special needs is such a bright spot in a world where acceptance and understanding is hard to find. I've seen my daughter grow tremendously, just by being given the opportunity to do so in such a caring environment". Mom of Caroline
2. "Our daughter Lilley has been coming to MTR for approximately 8 years. Our team of Karen, Mark and Tracey have been incredible to work with. Every week is an excellent adventure in addressing Lilley's needs and maintaining her total well-being". Parents of Lilley
3. "There is no simplistic way to express my gratitude, progress and overwhelming appreciation for MTR's existence and programs offered. In this past year alone, I've been able to sit unsupported, trot, stand up in the stirrups. I've also been able to stand without upper extremity support, walk supported on graded ground (in/down cline) and ride sideways and backwards to maximize the benefits a horse can provide. In ONE year, I've seen the pace of my recovery go from 0 to 60 on a scale of 0-100, in the sense that every session gives me new reasons to celebrate." Selina
4. "We are really excited that our son is actively engaging in his equine psychotherapy sessions and that he looks forward to his time at MTR and being with Fritz. He did not engage to this degree in the office setting and I felt like making progress would take forever whereas in the MTR setting, I feel that we'll see our son improve more rapidly which will give him relief sooner". Anonymous- Equine-Facilitated Psychotherapy Parent
5. "My son has made tremendous progress in his ability to listen, follow directions, interact with others, and be independent as a result of his working with the horses and the staff for the past seven years". Mom of RJ
6. "Working together through riding challenges, Chrissy the Wonder Horse has helped me cope better with challenges presented by my medical conditions". Military Rider Maureen
7. "If you asked me a year ago if my daughter would be able to ride a horse, I probably would have laughed at you. Now, I can proudly say, she loves it. She's stronger, braver, and is the most confident little lady I've ever met! Riding has made her believe she can do anything". I'm grateful. Mom of Stella
8. "I couldn't believe that after each lesson, his speech had become better and better! One thing is certain, when the riders are on their horse; the whole world is brighter for them. I've seen the smiles, and shared the stories, and it is truly a place where healing takes place. I feel blessed to be part of the MTR experience, and I would love for others to be able to grasp the rewarding feeling I see my Gabriel feeling (and me too) every time he rides". Mom of Gabe



## OUR TEAM

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**Heather Higdon**  
**Co-Chair Strategic**  
**Planning Committee**  
**Secretary of the Board**



**Chuck Faughnan**  
**Co-Chair Strategic**  
**Planning Committee**  
**Vice Chairman of the**  
**Board**



**John Voigt**  
**Treasurer of the Board**



**Kim DeChello**  
**Executive Director**



**Kelly Rodgers**  
**Program Director**



**Nancy Spiesman**  
**Member of the Board**



**Barbara White**  
**Member of the Committee**



**Jerry Housand**  
**Member of the Committee**



**Leslie Lewis**  
**Member of the Committee**





## OUR HERD

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The horses selected to be part of the team at MTR must undergo a rigorous 90-day trial during which they are tested for suitability for the program. Our horses are physically, mentally and emotionally fit and engaged in continuing their education and training with highly qualified riders. We are invested in keeping them healthy through holistic and traditional health care, stimulated through play, turn-out and dressage training, and happy with a balanced work/play/rest schedule.



Angel



Beauty



Chrissy



Emma



Fritz



GH



Onyx



Splash



Toril



Roux



Teddy