GROUNDWORK FOR ESTABLISHING A SUCCESSFUL PROGRAM INTO THE FUTURE

Clare Palmquist, Project ASTRIDE Program Coordinator.
Adv. Instructor, Site Visitor, CAT Faculty
Region 6 conference, 2014, Rice Lake, WI

Some in depth forethought, brainstorming and knowledge can assist a program on the path to success. Bring a think tank of stakeholders in to help in the process. Help to ensure that the program will be what you, they and the community will buy into not only as it begins but also as it grows.

Things to consider initially:
Profit or not for profit? Consider hiring a lawyer to put this piece in place. All attorneys must do pro-bono work so if you have a connection, use it! Some will not do pro-bono until the non-profit is fully established. Most lawyers on a board will gladly offer their advice but will not do work due to the potential for a conflict of interest. Donations to non-profits are often tax deductible.

Who will you serve and how? Is there a need in your community to serve this population(s)? Seek educators, practitioners, physicians, VA, OTR or PTA input. Is there growth potential? Can this population afford your program services? If not, who or what must be done additionally to make services affordable? If seeking grants do you have access to a successful grant writer?

**Once you have determined this immediately explore the process(es) of Certification(s) or licensure required by PATH Intl for your Equine Assisted Activities and Therapies (EAAT) professionals. These may potentially require 1-2 years to accomplish and may be in addition to a state’s licensure requirements (MD, PHD OTR/L, PTA, Masters etc.)

How will services be paid? Consider how and if this population will or can pay for services. Will services be billed, direct pay or reimbursed by a third party? What additional processes, considerations, credentials, licenses, insurance etc. will this entail? Consult a professional in the field for input regarding profession specifics. Grants can take 6 months from initiation to receive funding.

What is the program mission? Remember when determining this for a non-profit that this statement contains the parameters by which you are allowed to operate and maintain a non-profit status. Make it vague enough to allow growth yet not so specific that it is restrictive to the non-profit’s growth. Keep it short. Expose everyone involved in the program to this mission.
I.E.

Pie in the Sky will offer horseback riding to 4-10 year olds with Autism.

vs.

Pie in the Sky offers equine assisted activities and therapy to individuals who are physically or socially challenged fitting into traditional Central Wisconsin communities.

Find others with your passion. This is a two-fold consideration.
1) You should you seek out others already in the industry and visit their programs. You will see a diversity of programs and ways to implement a program. You will see not only see things you may want to replicate but also things you want to avoid.
Remember that other centers have developed administrations, policies and forms and may often be willing to share their contents and/or their experiences. Often for liability and ethical reasons established programs typically are NOT willing to have their center specific forms copied nor do they have the spare time to handhold others step-by-step through the process of starting a new center. Be respectful of their schedules and be prepared to come to them with specific questions so you do not waste their valuable time.

2) Find 3-4 individuals in your community that share a passion for the program or an aspect of the program. I.E. Alternative therapies, horses, outdoors, the specific population(s) to be served, volunteer opportunities, etc. Consider those who might also be able to assist with legal, financial, visibility or marketing assistance. This core group can share the burden of developing your pre-programming foundation. Remember they may not be as motivated initially but if you can light their fires they will help reduce burn out AND they will multiply the program’s base of ideas and contacts! They may also become your initial board of directors. You have connections but so will each additional person. If you choose well this will reduce the load, increase program connections and generate exponentially more ideas. This may mean the program could take a slightly different direction than originally envisioned. Consider it may be a better and ultimately a more successful direction.

Seek local assistance resources: There are often local or regional Non-profit foundations dedicated to assisting other non-profits. If program is a for-profit seek small business assistance groups. This is especially helpful for the start-up process, visibility and marketing strategies to name a few.

Is the facility strategically positioned for the services to be offered and if needed within proximity of an appropriate resource of volunteers? If the goal is to serve veterans but the facility is 30 miles away from the closest veteran resource or facility, how will veterans get there? If the goal is to work with the school systems is the facility within the school’s idea of a reasonable distance to you? Will the number of students justify the school’s cost to get them there?

Consider the program’s potential needs for a facility and PATH Intl’s standards** for operation. Who is responsible for these needs and their upkeep and compliance whenever services are offered?

What is your intended schedule: Class dates and times, volunteer trainings, events and schooling. A potential facility owner (especially if you don’t have a history) will want to know that you are training your volunteers, staff, participants, their families and guests to be respectful and act appropriately at their facility. What are the parking needs of those individuals as well as trailer(s), portable office and storage. Are there seasonal lighting needs? Will there be safety or operational concerns or conflicts due to circumstances outside of program control?

Barn: Accessible, stalls (if needed), access to horses, tack areas and storage, feeding and cleaning, safety considerations and needs. Closing gates, free of obstructions, quick release ties, phone, accessible bathroom, feed storage etc. Barn rules, pets, off limits, conduct, dos and don’ts.
Are you familiar with the current codes, regulations, and legal agreements that your program is required to follow? If so, know them immediately. If not, do your homework. Be prepared to know how to access and read the requirements of other programs. Be ready to discuss the many considerations that the PATH Intl staff have to think about when considering a program's safety, professionalism, and financial sustainability. Sometimes well intentioned programs initially put off their more difficult steps with good intentions to accomplish them “as they go”. When this is done coming into compliance after the fact can be overwhelming. A culture of negativity can develop in the program when others hear “We have to… it’s the rules”. Especially if the founder has not shared the standard requirements till after services begin.

Precaution: IF THE INTENTION IS TO RUN A PROGRAM AT YOUR PERSONAL FACILITY AND YOU INTEND TO EITHER RENT OR DONATE IT’S USE TO THE PROGRAM IT IS IMPERATIVE TO HAVE A BUSINESS AGREEMENT AND A LEGAL LEASE DEFINING THOSE AGREEMENTS. OUTLINE EQUIPMENT OWNERSHIP AND USE, JOB RESPONSIBILITY, COST OF USE, RENTAL, BOARD, FEED ETC. THIS IS A MUST DO!!

SITE IMPROVEMENTS FUNDED BY PROGRAM REQUIRE AN OWNER REIMBURSEMENT AGREEMENT.

BE A DEVIL’S ADVOCATE AND LOOK TO THE POTENTIAL FUTURE OUTCOME(S) OF A LEASE OR AGREEMENT. SERIOUSLY CONSIDER WHAT YOU CAN LIVE WITH AS CONSEQUENCES TO “YOUR” PROPERTY IF YOU ARE NO LONGER A PART OF THE PROGRAM DOWN THE ROAD. Remember to consider conflicts to all partners who have ownership in the land, equipment and the facility.
**Stakeholders:** Your natural partners are the most logical to choose first. Those who fit in multiple categories are often the best choices. A few ideas are categorized below.

**Horse related:** Stables, instructors, trainers, veterinarians, farriers and related horse care providers, horse rescues, 4-H groups or county extension agents, saddle clubs, show related clubs like WSCA, USDF, USEF, breed organizations like AQHA, APHA etc.

**Participant related:** Disability organizations, VA’s, schools, clinics, group homes, shelters etc.

**Medically related services:** Physicians, OTR/L, PTA’s, teachers, VA’s, mental health etc.

**Services (skills based) related:** Educators, Instructors, Recreational Therapists etc.

**Volunteer related:** Educators, PCA’s, United Way, church or faith groups, students with community service requirements, higher education programs (RN, OTR, PTA etc), senior groups, home schooled teens etc.

The more complete the business plan, vision and goals of the program the more likely the program will receive the support of stakeholders, I.E; professionals, the community, community organizations, schools and funders. The professional expectations a program initially establishes helps to create a positive and successful culture in the program as it goes forward. The pride in services to be offered will be apparent to stakeholders. Organized programs with written plans to achieve their goals tend to be viewed as proactive in their future and their success. They are a more attractive investment to most stakeholders and funders. Programs in a state of catch-up or organizational disarray appear to be in a reactive state to potential stakeholders and funders. This makes them a less attractive investment to funders and stakeholders.

Additional Resources:

- **AHA** American Hippotherapy Association  [www.americanhippotherapyassociation.org](http://www.americanhippotherapyassociation.org)
- Yahoo groups (join by emailing a request with your name etc. to the moderator)
  - Administrators group with access to templates and discussions about admin topics  [eaatcenteradministrators-subscribe@yahoogroups.com](mailto:eaatcenteradministrators-subscribe@yahoogroups.com)
  - Region 6 list for local connections and discussions  [pathintlregvi-subscribe@yahoogroups.com](mailto:pathintlregvi-subscribe@yahoogroups.com)
- **PATH Intl**
  - After joining PATH Intl you can join the Community Connections page for discussions.

**Professional Association of Therapeutic Horsemanship International Standards for Certification & Accreditation Manual and certifications are available on-line to member centers and individual members for free at [www.pathintl.org](http://www.pathintl.org).** For new centers, PATH offers the “Start a Center Packet and Standards for Certification and Accreditation” for a fee. Some form templates and checklists are available .Visit the [www.pathintl.org](http://www.pathintl.org) store for more information.