Business and Heart?

Kathy Alm
Chief Executive Officer
Center Sustainability

Data Gathering
- Focus groups
- Interviews with closing centers
- Web-based surveys

Key Factors That Relate to the Center’s Sustainability
- Funding
- Succession plans
- Qualified staff – low/lack of pay
- Board issues
Running Your Center Like a Business

Benefits?

Barriers?
Nonprofit Definition

A corporation or an association that conducts business for the benefit of the general public without shareholders and without a profit motive.
Running a Business

What Are the Components of a Business?

- Vision/Mission/Values
- Board
- Staff leadership
- Programs
- Facility/Equipment
- Finances
- Marketing/PR
- Community involvement
- Staffing
- Volunteers
- Strategic plan/Business plan
- Legal requirements
- Succession planning
Board of Trustees

- Term limits
- Job descriptions/written expectations for board and staff leadership – clarity of roles
- Clear criteria for joining the board
- Clear application process
- Orientation
- Clear financial giving expectations
- Staff not a voting member of the board
- Understanding governance versus operational board work
- Board self-assessment
Board of Trustees

Resources

- Boardsource.org
- United Way
- National Council of Non-profits
Staff Leadership

- Job description/clarity of role
- Contract
- Overseen by full board, not one board member
- Autonomy to carry out operations
- Focus of position should come from the strategic plan goals
- Equine experience not required
- Leadership, especially nonprofit, required
- Paid versus unpaid
Program(s)

- ROI
- Community needs analysis
- Resources
- Budget
- Goals
- Thoughtful planning
Facility & Equipment
Best Practices
Facility & Equipment

- Facility
- Tack
- Equipment
Finances & Budget
Best Practices
Finances & Budget

- Diversified funding
- Budget development and review
Finances & Budget

- Financial Policies and Procedures
  - Gift acceptance policy
  - Investment policy (for those contingency reserves you will build up 😊)
  - Contingency/Reserve policy
  - Document retention and destruction (see your state laws) policy
  - Wire transfer authorization
  - Contract and check signing policy
  - Credit card policy

- Financials Review
- Financial Projections
- Financial Audit
- 990
Legal

- Bylaws
- Insurance
- Taxes
- State charity registration
Fundraising

- Goals
- ROI on event/activity
- Fundraising on commission
- Identify purpose and build the case
- Transparency
- Fulfilling promises
Marketing & Public Relations
Community
Staffing

- Certified and/or licensed professionals
- Job descriptions
- Professional development
- Annual evaluations
- The right people on the bus
Equines

- Standard of care
- How many equines needed to provide services?
- Cost of one equine’s care?
- Screening process for equine intake?
- Equine orientation process?
- Process to address behavior issues?
- Process for retirement?
- Is your organization strictly EAAT or is it a horse rescue operation?
Volunteers

Best Practices
Volunteers

- Job Descriptions
- Intake/orientation
- Training
- Ability to remove a volunteer
Strategic Planning

- Outside facilitator
- SWOT analysis/Trends analysis
- Data gathering
- Board/staff retreat
- Reviewing mission/vision/values
- Understanding your competitive advantage
- Agreement on direction and priorities
- Goals development – SMART Goals
Succession Planning

- Both board and leadership staff
- Are the board and leadership able to continue after a departure?
- Abrupt and planned departures
- Not about picking a successor
- What happens during the transition?
- Founders
Maintaining the Heart
Key Takeaways
Thank You