

University of Southern Oklahoma therapeutic riding program

Kitty Campbell
Southeastern Oklahoma State University

Martin Bressler
Southeastern Oklahoma State University

Rod Leird
Southeastern Oklahoma State University

ABSTRACT

This teaching case is intended to increase student ability to develop a business plan that would meet both financial and strategic objectives of a regional university. The case can be used to help assess student understanding of organizational skills and organizational planning. The case also provides a good example of social entrepreneurship, where students have to look at non-profit marketing with three groups of customers—the university administration, donors/volunteers, and potential clients. The therapeutic riding program must also be sensitive to operating in the local community. This case is suitable for instructing senior level business majors in an entrepreneurship or business strategy course; however, the assignment would also be appropriate for the graduate level.

Keywords: business planning, therapeutic riding, PTSD, disabilities, case study, social entrepreneurship.

Copyright statement: Authors retain the copyright to the manuscripts published in AABRI journals. Please see the AABRI Copyright Policy at <http://www.aabri.com/copyright.html>

BACKGROUND

Kathleen Frazier grew up in north Texas, not far from the Oklahoma border. She has been riding ever since she was a little girl, has ridden competitively and now shows horses. Needless to say, horseback riding has been an important part of her life. When she went off to college, she majored in Animal Science at Texas A & M University and considered becoming a veterinarian. Although she decided to become a college professor, she never lost her love of horseback riding and being around horses. Like many riders, she enjoys riding as a means to relax and get away from the everyday stress.

Today, Dr. Kathleen Frazier is a Professor of Management at the University of Southern Oklahoma and continues to be an avid equestrian. Kathleen read several articles on the therapeutic benefits of horseback riding for persons with disabilities and thought there might be a way to help those in the area with disabilities to be able to ride a horse and have fun while alleviating stress. In addition, she had heard of several equestrian facilities offering programs for veterans returning from Iraq and Afghanistan with Post Traumatic Stress Disorder (PTSD).

The university has an equestrian center with both indoor and outdoor arenas used by the university rodeo team. Upon checking with rodeo team coach and the building director, she found that there was plenty of space and available time for the therapeutic riding program. Of course, Dr. Frazier would need to get authorization from the university so she arranged to meet with Dr. Benson, the University Vice President. Dr. Benson was cordial and listened carefully to Dr. Frazier's description of the proposed riding program but seemed uninterested in the idea. Nevertheless, at the conclusion of the meeting, Dr. Benson asked Dr. Frazier to put together a business plan for the therapeutic riding program, and he would see if it could be approved.

Dr. Frazier began to work on the business plan. She knew that as the university was subject to state funding, she would be wise to secure as much donated or in-kind equipment as possible. But there were other concerns besides funding. For Dr. Benson and the university to approve the proposed Therapeutic Riding Program, details of the program would have to be developed and any potential problems addressed. Although the program would not generate tuition revenue for the university, the university mission emphasizes service to the community. Dr. Frazier has already worked out a proposed calendar so that the riding program would not interfere with the university rodeo team schedule. Most of the youth programs would be in the form of summer camps, and the veterans programs would be held when no potential scheduling conflicts would arise.

In just a couple weeks she had the business plan prepared to present to Dr. Benson, but before doing so, she thought it would be a good idea to have a couple of her colleagues look over the business plan to make sure it would convince Dr. Benson and the university community that this would be good for both the university and the community. Following is the business plan Dr. Frazier prepared.

University of Southern Oklahoma*
Therapeutic Riding Program
Business Plan



Executive Summary

"In riding a horse, we borrow freedom." Helen Thomson

"Therapeutic riding is an individualized program of restorative and enjoyable activities where riders learn horsemanship skills. These skills translate into improved balance, strength, and flexibility for the rider. Studies have shown that riding can cultivate self-confidence and communication skills for children with emotional and psychological disabilities. It is also used to provide those with life-threatening illnesses a reprieve from the pain and depression associated with medical treatment. The riders develop a beneficial relationship with their horse through riding, grooming, caring for, and getting to know the horse". -----Helen Thomson

The demand for therapeutic riding program services continues to experience rapid growth throughout North America. As of 2015, the Professional Association of Therapeutic Horsemanship International (PATH Intl.), with over 850 Therapeutic Riding Program centers, reported that although its members provided services to 38,600 children and adults with disabilities, 6,676 people remained on waiting lists. In the Bryan County area, alone, 1320 children with special needs have been identified. There are Therapeutic Riding Programs in Oklahoma and Texas, but none are convenient to the Bryan County area. The closest program is located in Bonham, Texas, approximately 50 miles from Durant.

The University of Southern Oklahoma Therapeutic Riding Program (USO TRP) will be a not-for-profit program designed to meet the needs of children with physical, emotional, or cognitive disabilities. The USO TRP will provide well-trained and caring staff and volunteers to offer a unique and life-changing horseback riding experience to children in the Texoma area. The program will be housed at the University's Equestrian Center.

Most, if not all, families of children with special needs, have numerous health care costs. The goal of the USO TRP is to offer our services free of charge to participants. However, even

with volunteer help, our program will incur substantial costs that will need to be covered through various types of funding. The majority of our funding is expected to come from grants, individuals, and corporate donations. Several options will be available for individual and corporate giving.

Therapeutic Riding

Therapeutic riding can be defined as an individualized learning program to ride a horse taking into consideration a person's physical, emotional, and cognitive strengths and limitations. The horse's soothing rhythm, warmth, and three-dimensional movement pattern provide healthy exercise which stimulates the central nervous system and strengthens core muscles. Therapeutic riding helps physically and mentally challenged persons to attain goals that otherwise might seem impossible. Riding horses helps autistic children make connections and increase their communication skills. Riding enables an individual confined to a wheelchair to use the horse to freely move about. Therapeutic riding helps build confidence in the child and can help ease depression resulting from chronic pain. Therapeutic riding benefits individuals with a variety of disabilities because it works on three levels: physical, emotional, and cognitive

Benefits of Therapeutic Riding

Physical

Muscle tone
Trunk control
Balance
Posture
Motor development
Range of motion

Emotional

Relationship building
Self-awareness
Confidence
Self-esteem
Trust

Cognitive

Cognition skills
Spatial awareness
Language skills
Perceptual skills
Fine motor coordination

All of the horses, as well as the staff and volunteers associated with the therapeutic riding program, are cautiously chosen and instructed how to accommodate the rider's disabilities. Therapeutic riding goals vary among participants. Riders develop a bond with the horse, make new friends in the program, and learn to respect authority. The rider will typically improve in self-esteem, and their self-control and confidence also typically increase from success in learning to ride.

An important aspect of Therapeutic Riding is the fact that it is not perceived as a conventional session of physical therapy. Many physical therapy patients associate treatment with specific, repetitive and highly structured exercise regimens. Riding is seen as a recreational activity, and therefore it is not connected with therapy by the patients. In this way, many preconceived ideas and negative attitudes toward therapy can be effectively eliminated. In many cases, the rider with disabilities will be more enthusiastic, will make a greater effort, and will derive more benefit from such self-motivated therapy than from more conventional modes of treatment. In short, therapeutic riding is fun and effective.

Description of the Program

The University of Southern Oklahoma Therapeutic Riding Program (USO TRP) is a not-for-profit program designed to meet the needs of children with physical, emotional, or cognitive disabilities who wish to learn about horses and riding in a therapeutic environment. The USO TRP will provide well-trained and caring staff and volunteers to offer a unique and life-changing horseback riding experience to children in our community. Through therapeutic horseback riding, the rider will have an opportunity to achieve individual goals and objectives in a non-clinical environment.

Demand for the Program

It is expected that there will be a strong demand for therapeutic riding services in the Bryan County area. There are 1320 children with special needs identified within the eight school districts. The breakdown of these children by schools is as follows: Durant, 500; Achille, 120; Bennington, 80; Caddo, 100; Calera, 120; Colbert, 160; Rock Creek, 100; and Silo, 140.

Our Mission

We believe in the therapeutic value of horses in learning, especially for children with disabilities. The USO Therapeutic Riding Program strives to provide these children with a learning environment enhanced to provide personal growth in developing self-esteem through their success in therapeutic riding and horsemanship skills.

Our Vision

The Vision of the University of Southern Oklahoma Therapeutic Riding Program is to attain nationally recognition, and become a PATH accredited, provider of equine assisted therapy and rehabilitation to children with disabilities.

Our Philosophy

We believe the relationship between horse and human promotes healing.

We believe that people learn best in an environment in which body and mind are connected.

We believe people can learn when engaged in kinesthetic, visual, and auditory modalities.

We believe people learn best in an experiential and nurturing environment.

We believe people learn best when engaged within a community.

Our Values

We are committed to offering opportunities for self-learning and personal growth.

We believe it takes a herd (community) to raise a foal (child).

We value the time our staff and volunteers dedicate to embodying our mission statement.

Advisory Council

An Advisory Council had been formed consisting of individuals from the community who are familiar with various aspects of working with children with disabilities, the equine industry, business, and education. The members are Lisa Turner, Chair, Raquel Schmitz, Kathy Argo, Holly Fred, Cindy Kirkpatrick, Adam Lovell, Beverly Akin, Sharon Robinson, Dana Bonham, Donna Tyler, Jennifer Hilburn, Jennifer Purvis, and Kitty Campbell.

Consultant

A consultant has been retained to help us through the startup process. Linda Barron, retired Bit-By-Bit Therapeutic Riding Program Director at Rogers State University in Claremore, OK, has many years of experience in therapeutic riding programs. She is a long-time special education teacher as well as a licensed therapeutic riding instructor and will provide the initial training for the volunteers. Ms. Barron started the Bit-By-Bit program 11 years ago with one horse. On a weekly basis, the program now serves 76 special needs students using 13 therapeutic trained horses and more than 120 volunteer hours.

Program Director

We will hire a Program Director certified in Therapeutic Riding. This position may be filled initially on a part-time basis. The Director will be skilled in horseback riding and experienced in equestrian training and equine management. The Director must also be able to work under stress, be a good decision-maker, and work with diverse populations. In addition, s/he must be an experienced teacher with proven leadership experience. Specific job responsibilities will include: managing all aspects of the equestrian facility, recruiting and training volunteer workers, interacting with local non-profit groups and acting as the public spokesperson for the therapeutic riding program.

Instructors/Volunteers

Initially, the USO TRP will operate on a limited budget and will not be able to hire many employees to insure a high-quality therapeutic riding program. Therefore, we will supplement our paid employees with volunteers who in addition to helping instruct some of the riding lessons, will help provide support in several other ways. For example, volunteer staff will assist with fundraising events, public relations activities, and general maintenance of the equestrian facility. We will recruit volunteers from the university as well as from local organizations such as the 4-H and FFA (Future Farmers of America).

A particularly good source of volunteers is USO students. While any student could apply to be a volunteer, recruiting emphasis will be placed on those with majors in education, and special education in particular. Through the use of internships, students will gain valuable experience in working with children with a variety of disabilities and earn college credit as well. Detailed criteria for volunteers have been developed to insure that volunteers meet the physical demands of the job as well as possess the maturity to work in a volunteer capacity.

All volunteers will be instructed in basic training before being officially assigned as a volunteer to the program. Basic training will include horse handling, working with handicapped persons, basic First Aid and CPR, and safety requirements. Detailed job descriptions for each employee and volunteer describe the necessary skills needed to work in the therapeutic riding program.

The Facility

USO currently operates an Equestrian Center located on 12 acres on Veterans Blvd. in Ardmore, OK. The EC has three barns with approximately 50 stalls, turnout pastures with sheds, an outdoor arena, a round pen, non-handicapped accessible restrooms, a classroom/storage building, and indoor and outdoor washracks. During the regular school year, the EC is the home of the USO rodeo team, consisting of approximately 40 members. All available stalls and turnout pastures are occupied by rodeo team members' horses during this time. The team uses the arena every weekday for practice from approximately 2:00 p.m. until after dark. The arena is also utilized for horseback riding lessons through the HPER department and Continuing Education. A separate riding area will need to be built to house the TRP activities.

Other additions/modifications will be necessary before the TRP can begin offering sessions. Space is available for these, but funds will need to be raised to cover the costs. Additions and modification include the following:

- A covered round pen with sand and easy to open gates should be located within proximity to the mounting block/ramp and be large enough for safe riding exercises between equestrians. There should be a solid surface leading from the mounting area to the round pen.
- Handicapped accessible restrooms are large enough for moving about with wheelchairs. Grab bars should be located behind and on one side of the toilet. Toilet seat should be 17-19 inches high. Sinks and dispensers must be accessible. A large, padded changing table is needed.
- Parking areas that are adequately surfaced and with wide enough spaces for vans (8 feet) with wheelchair lifts and 8-foot access aisles. These spaces need to be located closest to the handicapped accessible entrance.
- Separate entrance if possible to avoid congestion with rodeo team activities
- Sidewalks or pathways suitable for wheelchair use or people using canes or walkers
- Bleachers for seating for parents and family members
- The tack room should be located close to the grooming and mounting area and be large enough for students to move about. Tack should be stored in such a way as to be easily accessible. A wagon or a rack on wheels will make transporting tack easier.
- The grooming area should be surfaced for ease of movement around the horse, including adequate space for a wheelchair. Grooming tools should be within easy reach.
- The mounting area should be wide enough for wheelchair and horse located close to grooming area, easily accessible, and free of obstacles for visually impaired. Mounting ramps should be coated with a non-slip material.

In addition to the facility, particular care will be given in the selection of horses to insure the utmost level of safety to both the riders and the volunteer workers. Likewise, equipment will be selected with safety first in mind.

Insurance

Liability insurance will be obtained through the University to cover the program, the riders, the volunteers, and the instructors.

Students

Students will be between 3 years and 21 years of age. We will recruit students from schools in the local districts, parents of children with disabilities, and non-profit groups serving persons with disabilities. Media coverage detailing the USO TRP plans should also be very helpful. Almost any child with their physician's permission can benefit from a therapeutic riding program. The final decision on rider selection will be a joint decision between the referral source, the physician, and the instructor(s) and be based on the instructors' ability to work competently with the type(s) of disabilities involved, as well as the appropriateness of riding therapy for that particular student. Initially, we plan to start a small pilot program, with two sessions per day, Monday through Friday, and a maximum of 4 students per session, and continue to grow the program.

There are certain forms for medical information, insurance, and liability that will be completed before a student rides. Information will be kept on file for each student which will include the rider application, medical history with physician's statement, authorization for emergency medical treatment, release and waiver statement, and photo release. Records of student progress will also be included.

Lesson Content

On their first visit to the EC, students will receive a tour of the facilities and be introduced to the staff members so that they are familiar and comfortable here. A lesson period, determined by the instructor, will most often not exceed 30 to 45 minutes. The lesson may include grooming, tacking up, and ground work as well. The instructor will always be present and assist with the mounting procedure. Students will be encouraged to be as independent as possible. The rider's self-help abilities will be taken into consideration when determining the mounting technique to be used:

- a. Total assistive lift-the rider must be physically lifted from the wheelchair. (May require two lifters and additional helpers).
- b. Assisted lift from ramp- the rider is atop wheelchair mounting ramp and is lifted up and transferred to the horse.
- c. Mounting block-the rider climbs steps to top of block and mounts (may need assistance).
- d. From ground-"leg up" or foot in stirrup swinging other leg up and over (either side).

Instruction

The length of time that any rider spends in the saddle will be determined on an individual basis. The type of disability, the student's age, physical ability, cognitive ability, medication, weather, and attention span are some factors to be considered when planning the lesson. The instructor will design the lesson to meet the educational, medical and recreational goals of the rider. Age appropriateness is a vital concern for all group lessons as well as in content planning.

Classes

The USO TRP will operate Monday through Friday year round with three-week terms. Initially, there will be two sessions each day, at 9:00 and 10:30. Each group class will be 45 minutes and private lessons 30 minutes long. Classes will be structured based on the needs of the rider. Most of our riders will attend one therapeutic riding lesson per week. At the end of each term there will be a two-week break. These breaks have been implemented to ensure the well-being of the program horses as well as to achieve consistency with our volunteers. Upon acceptance into the program, the student will receive a calendar outlining the terms, holidays and breaks and a copy of the Program rules and policies.

Marketing Plan

The demand for therapeutic riding program services continues to experience rapid growth throughout North America. In 2006, The Professional Association of Therapeutic Horsemanship International with over 850 Therapeutic Riding Program centers reported that although its members provided services to 38,600 children and adults with disabilities, 6,676 people remained on waiting lists. There are several Therapeutic Riding Programs in Oklahoma and Texas but none are convenient to the Bryan County area. The closest program is located in Bonham, Texas, approximately 50 miles from Durant.

A variety of media will be used to advertise the pilot program. Promotional efforts will include communication with community organizations, educational facilities, local businesses, other not-for-profit organizations, potential client groups, and the local media. An emphasis will be placed on public relations rather than paid advertising. Public relations efforts will include press releases and community interest stories in area newspapers, appearances by program representatives on local television station talk show segments, and radio interviews and public service announcements. Program information will also be broadcast via the USO radio station, KSSU, and the student newspaper, the Southeastern. The goal will be to make the public aware of what the pilot program is doing, why it is doing it, whom it serves, and how it contributes to the welfare of the community.

An informational brochure will be developed to provide program information to the local businesses, school districts, parent groups, area agencies serving the disabled and Native American tribes. In addition to the USO, several organizations have already expressed support for the program, including the Durant Independent School District, the Choctaw Nation, and the Durant medical community.

We will continue to develop the Therapeutic Riding Program website (<http://se.edu/therapeutic-horseback-riding/>) to provide up-to-date information about the program. Included will be information on the programs, staff, horses, volunteer opportunities,

donor programs, a calendar of upcoming events, a map and directions, pictures of program participants and activities, and contact information. Also, we will send a monthly newsletter to all program participants and other interested parties. This newsletter will provide a recap of the month's activities and reminders of upcoming events.

Financial Plan

Most, if not all, families of children with special needs, have numerous health care costs. The goal of the USO TRP is to offer our services free of charge to participants. However, even with volunteer help, our program will incur substantial costs that will need to be covered through various types of funding. Our primary source of funds is expected to come from grants, individuals, and corporate donations. Individuals and organizations wishing to contribute to the program will receive a tax deductible donation receipt and can choose from several donation options. These include:

Sponsor an Event

Each year the USO TRP will host several fundraising activities that generate revenue to help fund the program. Fundraiser events could include Ride-A-Thons, Horse Shows, and Silent Auctions.

Sponsor a Child

Unfortunately, despite its proven medical benefits, therapeutic horseback riding is not yet covered by most insurance. Many families in our area will not be able to afford to pay for riding sessions. The USO TRP has a core belief that no student who wants to participate in therapeutic riding should be turned away. An extensive review of therapeutic riding programs shows that the average fee per session is approximately \$35. Sponsors may select from several levels of donations.

- Sponsor a child for one month: \$100
- Sponsor a child for six months: \$600
- Sponsor a child for one year: \$1,200

Sponsor a Horse

The USO TRP cannot be successful without an excellent herd of horses, specially trained to work with persons with disabilities of various ages. The annual cost to keep and maintain a horse can easily be \$2,400 or more in order to cover costs for feed, veterinary care, shoes, and other expenses. Providing high quality care for our therapeutic horses, while at the same time keeping the cost of lessons as inexpensive as possible for our students means that we will need to solicit donations. For \$200 per month sponsors can make a significant difference in helping to offset the program's primary expense, and it is tax deductible. We will display the name of the sponsor on the front of the horse's stall. Sponsors will receive updates on their horse, and a framed photo of their horse along with a certificate of appreciation.

Financial Contributions

Financial contributions are a great way for individuals to demonstrate support for the riding program. The USO TRP is dedicated to being fiscally responsible to our donors, our students, our horses, and our volunteers. Donor financial support will allow us to “keep the doors open and the horses fed.” These tax deductible donations will assist us in purchasing horse care supplies, special riding lesson equipment, office supplies, and enables the USO TRP to continue to provide a safe, professional, and dynamic environment for our students. Donors can make financial contributions in several ways, including:

- Annual gifts.
- Pledges. Pledges allow the donor to allot their gift over time, making it easier for the donor to budget.
- Memorials/honorary gifts. Memorials let the donor make a gift in honor of a loved one, or a cherished horse. A memorial is an excellent way to honor that special person or horse.
- Bequests. We can work with you in developing an estate plan to help sustain the USO TRP.
- Corporate gift-matching. In some instances, corporations will match donations made by their employees.

Donor Program

A program will be developed and named that distinguishes various levels of donations. Each donor will receive a letter and certificate of appreciation and will receive the monthly newsletter. Possible donation levels are:

\$5000 & above
\$1,000-4,999
\$500-999
\$100-499
<\$100

Equipment Donations

Donations of equipment and supplies will assist the USO TRP to keep financial outlays to a minimum. Donations of equipment and supplies will assist us in providing the therapeutic services that persons with disabilities in the area need. A "Wish List" will be placed on the program's website and in the newsletters. Requested items might range from office equipment such as computers, copiers, and printers to stable and tack supplies, to feed and horse care equipment.

Grants

We will identify foundations that provide grants to therapeutic riding programs and seek to secure funding for our program. There are several foundations and organizations that support startup expenses, operational expenses, and endowments.

Price list for equipment

Item	Price each if purchased	Initial Number Required	Total Cost	Comments
Protective Helmets	\$75.00	4	\$0	The EC has helmets that can be used by the TRP
Hand Hold	\$43.00	4	\$172.00	
Safety Stirrups	\$35.00/pair	4	\$140	
Therapeutic riding saddles or English saddles	\$1000 (new)	4	\$0	The EC has 9 English saddles that are no longer used. These can be cleaned/refurbished and used in the TRP
Bareback pads	\$250.00	4	\$1000	
Halters	\$15		\$0	Provided by EC
Lead ropes	\$10		\$0	Provided by EC
Seat Saver pads	\$50.00	4	\$200	
Devonshire boots	\$100/pair	4	\$400	
Mounting block	\$120 - 2 step \$175 - 3 step \$225 - 4 step		\$520	Could be built by USO or volunteer
Mounting ramp plans	\$20.00		\$20	Ramp could be built by USO or volunteer
Instructional Aids	\$20.00 - Bean bags \$15.00 - Go, Slow, Whoa markers \$55.00 - Colored circles, stars, squares for arena markers \$60.00 - Cones \$20.00-60.00 - Sensory balls \$30.00-50.00 - Tactile and balance balls		\$260	
Cost to purchase horses	\$2000+	4	\$8000+	Emphasis will be on getting horses donated
Horse care cost/horse/year	\$2,400 - feed, bedding, shoes, veterinary care, and other expenses	4	\$9,600	Sponsor a Horse program to offset costs

Year 1 Budget**Income**

Special Event Income	
Individual Donations	
Corporate Donations	
Grants	
Other Income	

Expenses

Horses \$2000/ horse x 4 horses	\$8,000
Horse Health Care \$2,400/horse x 4 horses	\$9,600
Equipment	\$2,712
Part-time Program Director Salary	\$20,000
Postage	\$300
Printing Stationery, Brochures, forms	\$500
Promotional Expense	\$500
Repairs and maintenance	\$1500
Supplies	\$750
Office Equipment Computer, printer, fax, filing system, telephone	\$2,500
Miscellaneous	\$2,500
Total Expenses	\$48,862

Growth Plan

Year 1

- Visit several therapeutic riding centers to learn about their operations and establish contacts
- Secure facilities at the Equestrian Center for TRP activities
- Create business plan
- Develop budget
- Implement marketing/public relations plans
- Begin fundraising activities
- Obtain four healthy, sound horses/ponies through donation or purchase
- Obtain equipment through purchase or donation
- Recruit reliable staff and volunteers
- Hire Program Director
- Organize and implement a pilot program
 - Gather individuals with needed skills and expertise with the purpose of providing a safe setting and high-quality therapeutic equine activities
- Identify and attract participants for the program
- Develop website
- Develop monthly newsletter and mailing list database

Year 2

- Continue fundraising activities
- Continue to advertise program's services within community
- Obtain four additional healthy, sound horses/ponies through donation or purchase
- Acquire additional equipment through purchase or donation
- Recruit reliable staff and volunteers
- Join PATH Intl. as a Center Member
- Begin PATH Intl. certification process for at least one instructor
- Keep website up-to-date
- Continue monthly newsletter and expand mailing list database
- Continue to improve facilities
- Achieve financial security

Year 3

- Continue fundraising activities
- Continue to advertise program's services within community
- Obtain four additional healthy, sound horses/ponies through donation or purchase
- Acquire additional equipment through purchase or donation
- Recruit reliable staff and volunteers
- Continue PATH Intl. certification process for additional instructors
- Attend PATH Intl. Center Accreditation Training course
- Attend PATH Intl. annual or regional conference
- Keep website up-to-date

- Continue monthly newsletter and expand mailing list database
- Continue to improve facilities
- Achieve financial security

Year 4

- Continue fundraising activities
- Continue to advertise program's services within community
- Acquire four additional healthy, sound horses/ponies through donation or purchase
- Obtain additional equipment through purchase or donation
- Recruit reliable staff and volunteers
- Certify more therapeutic riding instructors
- Send staff and volunteers to PATH Intl. annual or regional conference
- Attend PATH Intl. Center Accreditation Training course
- Apply to become PATH Intl. Premier Accredited Center
- Prepare for PATH Intl. site visit
- Keep website up-to-date
- Continue monthly newsletter and expand mailing list database
- Continue to improve facilities
- Achieve financial security

Year 5

- Continue fundraising activities
- Continue to advertise program's services within community
- Acquire four additional healthy, sound horses/ponies through donation or purchase
- Obtain additional equipment through purchase or donation
- Recruit reliable staff and volunteers
- Certify more therapeutic riding instructors
- Send staff and volunteers to PATH Intl. annual or regional conference
- Receive PATH Intl. accreditation
- Apply to become PATH Intl. Premier Accredited Center
- Prepare for PATH Intl. site visit
- Keep website up-to-date
- Continue monthly newsletter and expand mailing list database
- Continue to improve facilities
- Achieve financial security

New Facilities

As the program grows, it is likely that we will outgrow the current riding facility and we will need to build a new indoor riding facility. The new riding facility will need to include a riding arena, classroom facilities with a viewing area for parents, administrative office space; and a waiting area with ADA-compliant restrooms; along with other updated features.

PATH Accreditation

One of our goals is become accredited by the Professional Association of Therapeutic Horsemanship International (PATH Intl.). Located in Denver, Colorado, PATH International's mission is to foster and encourage equine activities for disabled persons. Although it is not a requirement that the USO TRP program be PATH accredited to begin offering our program, PATH Intl. membership offers a number of benefits.

“These include:

Accreditation - This program assures that the PATH Intl. center is running a safe and medically appropriate program and that it is following the PATH Intl. Standards. The process includes an on-site visit where the facility, equipment, instruction methods, volunteer training, and paperwork are evaluated by a PATH Intl. accreditation team.

Instructor Certification - This program provides criteria for competency and a process to recognize levels of capability for PATH Intl. instructors to achieve professional certification. Three levels of certification are available: Registered, Advanced, and Master Instructor.

PATH Intl. Center Insurance

All PATH Intl. Center Members are required to have at least \$1,000,000 of Liability Insurance Coverage, as well as Excess Accident Medical Coverage with limits of \$15,000 for Accidental Death/Dismemberment and \$10,000 for Accident Medical Expenses at all times” (Retrieved 05/30/2017 from <http://www.pathintl.org/>).

Full-Time Staff

As the program grows, it will be necessary to hire additional paid staff to add stability.

CONCLUSION

Dr. Frazier had completed the business plan and had sent it to several colleagues in preparation of her meeting with Dr. Benson. She was sure she had covered all of the important aspects of the program in the business plan and believed that getting the program approved by the university administration would not be much of a problem. Of course, she wanted to be sure she had every possible issue accounted for to increase the likelihood of the program being approved.

Her colleagues thought the program was a great idea and a wonderful way to interact with the local community. As she sat in her office, she mentally went through a list of issues but couldn't help think she might be missing something important.

TEACHING NOTE

Synopsis

Dr. Kathleen Frazier is a Professor of Management at the University of Southern Oklahoma and an avid equestrian. She has been riding ever since she was a little girl, has ridden competitively and now shows horses. Needless to say, horseback riding has been an important part of her life. Like many riders, she enjoys riding as a means to relax and get away from the everyday stress. Kathleen read several articles on the therapeutic benefits of horseback riding for persons with disabilities and thought there might be a way to help those in the area with disabilities to be able to ride a horse and have fun while alleviating stress.

The university has an equestrian center with both indoor and outdoor arenas used by the university rodeo team. Upon checking with rodeo team coach and the building director, she found that there was plenty of space and available time for the therapeutic riding program. Of course, Dr. Frazier would need to get authorization from the university. She set up an appointment to meet with Dr. Benson, the university Vice President. Dr. Benson was cordial and listened carefully to Dr. Frazier's description of the proposed riding program but seemed uninterested in the idea. However, at the end of the meeting Dr. Benson asked Dr. Frazier to put together a business plan for the therapeutic riding program and he would see if it could be approved.

Dr. Frazier began to work on the business plan. She knew that as the university was subject to state funding, she would be wise to secure as much donated or in-kind equipment as possible. But there were other concerns besides funding. In order for Dr. Benson and the university to approve the proposed Therapeutic Riding Program all the details would have to be worked out and especially, any potential problems.

In just a couple weeks she had the business plan prepared to present to Dr. Benson, but before doing so, she thought it would be a good idea to have a couple of her colleagues look over the business plan to make sure it would convince Dr. Benson and the university community that this would be good for both the university and the community.

Dr. Frazier will likely need to meet with Dr. Benson and perhaps other university officials to discuss the proposed venture. She must now consider all the positive and negative aspects of beginning such a program at USO. One of the challenges will be to convince university officials that the therapeutic riding program will achieve more for the university than simply some good publicity.

Background

Therapeutic riding is an individualized program of restorative and enjoyable activities where riders learn horsemanship skills. These skills translate into improved balance, strength, and flexibility for the rider. Studies have shown that riding can cultivate self-confidence and communication skills for children with emotional and psychological disabilities. It is also used to provide those with life-threatening illnesses a reprieve from the pain and depression associated with medical treatment. The riders develop a beneficial relationship with their horse through riding, grooming, caring for, and getting to know the horse.

The demand for therapeutic riding program services continues to experience rapid growth throughout North America. As of 2015, the Professional Association of Therapeutic

Horsemanship International (PATH Intl.), with over 850 Therapeutic Riding Program centers, reported that although its members provided services to 38,600 handicapped children and adults, 6,676 people remained on waiting lists. In the Bryan County area, alone, 1320 children with special needs have been identified.

Research points to the use of animals as a form of therapy to provide calming effects to children with autism, overcome physical challenges associated with cerebral palsy along with veterans and others suffering with Post-Traumatic Stress Disorder (PTSD) and other behavioral health issues. Similar to cats and dogs as Emotional Support Animals (ESAs), horseback riding develops a bond between the horse and rider. In addition to the therapeutic value, horseback riding provides exercise and fun as well as the excitement of mastering horsemanship.

In numerous locations across the country, private and publicly owned equestrian facilities are now providing therapeutic riding programs as a means to serve their local community members who can benefit from the programs such a facility can provide. Veterans suffering from PTSD often enjoy gathering at the stables with other veterans for group riding lessons, trail rides and riding in parades. Riding facilities will typically offer individual riding lessons and camps for young children with autism.

With a sport such as horseback riding, potential injury and therefore, legal liability is a concern. This can be especially true when dealing with young children who might not be calm around horses. These programs require more instructors and assistants to provide the attention necessary for safety. Equestrian centers also typically require all riders to sign a liability waiver in the event of injury and recommend younger riders wear a helmet for their personal safety.

An example of this type of facility located in north Texas can be found on Facebook at <https://www.facebook.com/Divine-Equine-Therapeutic-Riding-Center-208953609177411/> A closer look at the clients they serve can be found on their YouTube promotional video <https://www.youtube.com/watch?v=UncI-nNSBW4>

Additional information can be found at the website for the Professional Association of Therapeutic Horsemanship International (PATH Intl.), at <http://www.pathintl.org/>

A listing of therapeutic riding programs in Texas and Colorado can be found at <http://www.texashorsemansdirectory.com/TherapeuticRiding.html>

Objectives

1. Evaluate the proposed business plan to determine if the plan would meet the strategic and financial objectives of the university.
2. Ascertain that Dr. Frazier has addressed all potential concerns (due diligence) for starting the therapeutic riding program at USO.
3. Identify additional funding sources for the program.
4. The case can be used to help assess student understanding of organizational skills and organizational planning.
5. The case provides a good example of social entrepreneurship, where students have to look at non-profit marketing with three groups of customers—the university administration, donors/volunteers, and potential clients. In addition, the therapeutic riding program must be sensitive to operating in the local community.

Questions for Discussion

1. What do you think of the overall business plan? What are the strengths, weaknesses, opportunities and threats facing this proposed venture?

Dr. Frazier has included all the major aspects of what a sound business plan should have. Strengths would include: needed service to an under-served population; partnering with the university; ability to leverage university assets, labor, and maintenance. Weaknesses would include: limited funding; reliance on volunteers; possible difficulty with transportation of clients to facility. Opportunities would include: expansion of services to include veterans with PTSD or other persons who might benefit from this type of program. Threats: reduction in state funding; difficulty with volunteer staff; inability to secure support from the university, and possible client injury while using the facility.

An important question that needs to be addressed would be to determine how to overcome any funding shortfall during the initial start-up period and later, should the program not become self-sufficient.

But perhaps the biggest issue is whether the therapeutic riding center is a good strategic fit with the university's overall strategy and mission. Should it be a free-standing 501 C3 corporation?

2. Assuming funding will not be an issue for this business plan, what other problems/challenges do you think that Dr. Frazier will encounter?

As indicated above, funding, continued financial support, and the ability to recruit and maintain a core of capable volunteers will be keys to success in this proposed venture. Dr. Frazier will likely find a number of organizational issues, dealing with clients and their parents, volunteers, donors, the local community, and the university administration.

There will also be difficulty with initial client recruitment based on lack of understanding of core benefits for target audience.

3. In the event that there are not enough donations of material to meet the needs for startup, are there any other options?

As the facility and staff would already be in place, they could consider some other sources of revenue that might include offering riding lessons for a fee to people in the area, selling equine related equipment such as feed and tack, and they could even have fundraising events such as a rodeo, horse show, or riding competition. Dr. Frazier could also work with other centers and the national association to identify grants from NGO and possible government sources. Washington state and the city of Dallas, Texas are among several governments that have provided grants to therapeutic riding facilities. Working with veterans could also open the possibility of securing some funding through the Wounded Warrior Program or other veterans group.

Another potential source of revenue would be to provide PATH instructor certification, much like other colleges and universities do with their equestrian academic programs. The University

of New Hampshire, Ohio University, Texas Tech University, and North Dakota State University are just a few of colleges and universities which offer PATH training and certification.

4. If you were Dr. Benson, what would be your concerns regarding this proposal?

The immediate concern is whether Dr. Benson and the university will support the concept of a therapeutic riding program at the university. As USO is a state university, there is likely to be a number of bureaucratic hurdles to overcome before this idea could be approved.

Long-term, the major issue would be sustainability—would the program continue to receive university support? Would the program be able to continue recruiting capable volunteers? Sometimes what begins as a good volunteer project becomes real work! Would there be continued interest in the area for a program of this type? Also, Dr. Benson would need to determine if the proposal is a strategic fit for the university. Lastly, with limited resources available, would this be considered a priority project for the university?

5. If you were a parent of a child with disabilities, would you send your child to this facility? Why or why not?

This is largely an opinion question but from a safety standpoint it appears that Dr. Frazier has developed a sound program with appropriate safeguards. However, despite all precautions, there is always the possibility of an accident. Care-givers would need to be educated on the long-term value of riding activities versus other programs.

Parents might be concerned whether the instructors have training in handling children with special needs and/or working with veterans with PTSD. Having a desire to help others is important, but being able to provide a safe learning environment is critical. PATH offers certifications including the Equine Specialist in mental Health and Learning. Given the potential for accident or injury, it is recommended that instructors also be certified in CPR and basic First Aid.

6. How would you go about securing sponsors and who might they be?

Securing sponsors is usually more difficult than what people think. Companies have a certain budget amount set aside for charitable contributions and often continue donating to the same projects year after year.

Some good places to start might be companies that supply the equine industry—saddles, tack, feed, and stable supplies. Dr. Frazier might also contact businesses that sell western wear clothing such as Cavender's and Shepler's as well as local western stores. Feed company Purina is already a sponsor for the Professional Association of Therapeutic Horsemanship International.

Another possibility might be non-profit associations dedicated to helping children with disabilities. Of course, Dr. Frazier should also consider the for-profit ideas described above in the answer to question 3.