Executive Report to the Board

January 2017

Staff: We are excited to welcome, Lesley Olsen as our new Finance Director. Lesley starts on April 17th. A local equine enthusiast and business manager, she also brings varied nonprofit experience working at the East Haddam Land Trust and with the Nature Conservancy. Eager to roll up her sleeves, she is learning all about High Hopes. Please stop in to meet her.

Program: Program Overview:

We have completed our five-week Winter Semester just six weeks left in our first "Academic Semester." The Academic Semester is serving 238 participants each week. 146 individuals and 82 group participants, and 10 community lesson riders. We are also serving 8 school and social service agency groups, and for one of those groups (New London) we have been able to serve 64 participants (rotating classrooms every 9 weeks.) The Equus Effect at High Hopes Veteran's program served 12 veterans in third quarter, plus over 25 veterans who attended our hands-on IAVA VetTogether to share information about our veteran services. We are in the contract renewal phase with these groups, and anticipate exploring other schools or SSA's to partner with for the next Academic Semester. In 3rd quarter there were 32 participant inquiries, and we accepted 8 new participants. There are currently 4 participants pending assessments, and 5 participants on the waiting list. We also hired two new part-time instructors, Anna Lennard from Old Lyme, who is a recent ITC graduate, and Stephanie Trafka from RI. Jonnie Edwards has decided to retire at the end of the semester – we are grateful for her many years of dedicated, passionate service to her riders and wish her well.

Volunteers:

- We currently have 314 active volunteers totaling 3667 hours between January and March.
- 48 inquiries this quarter; 71% trained or scheduled for training
- 45 attended a General Orientation this quarter (Jan-March)
- 26 attended Sidewalker training; 18 attended Leader training, 2 were Long Line trained

- Recruitment & Training
  - Outreach Events Attended/Hosted:

1. ***Chili Open House – March 25th (aprx 25 people attended)***

  - Outreach Events Scheduled:

1. ***Adaptive Sport Fest – April 9th***
2. ***Young Professionals Chamber Event – April 18th***
3. ***Lyme Volunteer Open House – April 23rd***
4. ***Family Resource Fair – May 20th***
5. ***Lenny and Joe's Magical Fish Tale Charity Carousel – June 9th***
6. ***Mid-summer Festival – July 29th***

- Group Volunteer Opportunities
    - Williams School 4/26 – Earth Day Work Day (37 volunteers Expected)
    - Liberty Mutual Insurance "Serve with Liberty" 5/4 – Volunteer Day (# TBD, aprx 20)
- Retention
    - Volunteer Appreciation Event April 17-22nd including Thank You notes and a Pamper Hamper put together by the Volunteer Auxiliary.
- New initiatives
    - Working to develop new scheduling system for summer program to reduce sub calls
    - Establishing new processes with the incorporation of SalesForce and phasing out of JAKE

Special Programs:

Field Trips Provided

JWU	*6*	*1/12/2017*
Sound Community Services	*9*	*1/17/2017*
Franklin Academy	*10*	*2/8/2017*
Post University	*8*	*3/23/2017*
Old Saybrook Youth and Family Services	*13*	*2/15/2017*
Behavioral Management Services	*12*	*2/23/2017*
Williams School	*12*	*3/30/2017*

Total: 70

Upcoming Field Trips

Williams School - Field Trip/Vol Day	*37*	*4/26/2017*
Girl Scouts	*3*	*5/5/2017*

Facility:
-17-18 capital improvement item bids in process, include improvements to the paddock pathway.
-5 year capital projections to being updated for budget planning.
-Potential parking lot expansion is progressing, survey work was done recently with results pending.

Horses:
Horse workload efficiency for January 1 through March 31:
Horses were available to work at 94% of maximum capacity (lameness accounted for an average of 1.6 horses out of work each week)
They were utilized at 62% of their availability (1432 activity units of 2323 available units)
Maximum capacity with all horses working at their limit is 2462 units

April 2017 Training and Education Update: Completed since January 2017:

January 2017 ITC's
2 candidates completed the January PATH Approved Instructor Training Course in April 2017
Equus Effect Training – first time offered to outside candidates-14 attendees
Winter Lecture Series (January and February) -10 outside individuals attended a total of 21 lectures

February
Autism and Sensory Processing One Day Workshop-15 individuals attended including 2 ITC's
Advanced Prep Three Day Workshop-5 attended
Business Admin and Fundraising Two Day Workshop-7 attended
ESMHL – Equine Specialist in Mental Health and Learning Workshop and Skills Test-15 attended

March- Therapy Horse –5 attended (rescheduled due to weather)

April -Beyond ESMHL 'Next Steps' New workshop offered -18 attended

In addition to scheduled monthly offerings above, High Hopes offers 'On Demand' opportunities:
1 Advanced Instructor "On Demand' certification conducted this quarter
2 Registered 'On Demand' certifications conducted this quarter

Deliverables since January 2017 / focus for FY 2017-18:
Monthly updates of 2017-2020 T & E Business Plan completed and on task
2017-18 T & E opportunities planned with accompanying DRAFT budget
Prospective on site housing revenue projections developed and submitted for consideration
Guidance and mentoring provided to ITC's

Other Business:Johnson & Whales & Post University equine studies students interested in pursuing career in EAA&T visited High Hopes this quarter.

Finance: Will be sent out 4/24/17 and available at the meeting

Development:

Appeal : Budget goal $285,000
Raised to Date: $213,355 -includes confirmed pledges and matches ($212,000 same time in 2015/16)
Board Donations & Pledges = $51,250 from 15 trustees ($50,380 total raised by Board in 2015/16)

Major Gift & Grants : Budget goal $315,000
Raised to date $337,509
Received $222,677 in restricted gifts (includes $19,000 in pledges) – Budget goal $200,000
$127,000 received from Individuals or private family foundations
Received $114,830 in unrestricted donations (includes $20,00 in pledges) – Budget goal $115,000
Outstanding requests = $150,000
Major gift needs and requests for 2016/2017 have been directed to technology improvements, Harkness and off-site programming, Horse Sense and IELP program development, Veterans program funding and scholarship support.
Grants received in 3nd quarter include:

- Thompson Family Foundation $40,000 for Scholarship & veterans' programs
- Kitchings Family Foundation $20,000 for New London Schools and unrestricted
- Newman's Own $5,000 for scholarship support
- Gardiner Family Foundation $7,000 for Harkness
- Community Foundation of Eastern Connecticut $5,000 Norwich Horse Sense
- Eastern Connecticut Chamber of Commerce $2,000 for Harkness

High Hopes Holiday Market: Raffle Update: Valenti working with us to provide a Jeep Wrangler!

Concert 2017: Budget Goal is $204,390 net.
Notewriting by the Board and Committee Chairs to take place April 24 through 30th.
Corporate Sponsorship stands at $113,650 exceeding its budget goal of $110,000.
Auction Highlights:

- Patriots Opening Day (rumored to be the Atlanta Falcons) with VIP access
- Hamilton Tickets with 2 night stay in Corporate Apartment
- St. Croix Villa, sleeps 10 with exclusive activities
- Dinner with Jacque Pepin, prepared by High Hopes chefs Cheryl Heffernan and Sara Qua (yikes!)
- Heisman Trophy Dinner
- Bequia oceanfront stay
- Joe Standart portrait
- Celtics VIP Experience

Scholarship will be a live auction conducted by a professional auctioneer. Julia Balfour is preparing a two minute video featuring former High Hopes participant Melissa Carney.

Endowment Feasibility Study: The Giving Collaborative has begun preparing the Context for Conversation & other materials needed for outreach to donors to be invited for study interviews. The Development Office has identified 90 donors that can be contacted in order to reach our 30 interviewee goal. These donors have been ranked in order of priority based on their giving potential and relationship to High Hopes. The Development Office will begin to set up these interviews in late April/early May.