**HELPING HORSES SANCTUARY**

When she walked back to the house from the evening feeding, Judy Bronson, Executive Director of Helping Horses Sanctuary, was worried and stressed. How was she going to make ends meet and recruit and train more volunteers? The cost of hay was much higher than in prior years. The veterinary bills were skyrocketing because of the poor health of several of the horses and donations had decreased. She was frustrated because her previous attempts at engaging the all-volunteer workforce to increase fundraising efforts had not been successful.

In addition, engaging volunteers in daily chores had not been successful. Past strategies of scheduling volunteers to work, sending e-mail reminders of volunteer work schedules had not worked and regular volunteer participation remained at the 7 to10 active volunteers. The remaining 28 to 30 volunteers stated that they were busy with family and life activities.

Fundraising, donations, and grants have been the sole sources of funding for Helping Horses. Fundraising was a key driver for increased revenue. What was she going to do to address the increased operating costs? How was she going to increase revenue by increasing fundraising?

Volunteers were critical for fundraising efforts and survival of Helping Horses. Judy knew volunteers needed training on effective fundraising methods. How was she going to provide the training needed to increase fundraising efforts for the sanctuary? What type of training did the group need? What fundraising activities would be successful with the limited time and volunteer resources? How will she address volunteer resistance to training? What should Judy do?

**Background**

Judy Bronson was in her 60s and had devoted her life to the rescue of horses in need. She had not always been involved in not-for-profit organizations. She spent many years working for a large retailer and traveled to stores assisting with point-of-sale processes. After that she started her own consulting company and was quite successful in the corporate sector until a close friend changed the direction of her life. This friend introduced her to the plight of unwanted and abandoned horses.

The Helping Horses Sanctuary was founded in 1999 as a horse rescue and sanctuary. Judy Bronson and a close friend started with the rescue of Charity, a club hoofed colt. The central mission of the organization was: “the rescue, care and protection of mistreated and neglected horses, wherever they may be.” Horses come to the sanctuary for a variety of reasons related to inability or availability to care for the horses. Some examples were: lack of time, limited monetary resources, lack of space/facilities, physical ability to care for horses, medical condition of the horse, and/or perception of lost value.

Helping Horses Sanctuary was located on twenty acres in a rural area of the Midwest. The horse sanctuary has welcomed the public on specific open tour dates and arranged private tours. Fourteen horses called Helping Horses Sanctuary home, and six were in foster homes. From its inception, 803 horses were rescued by Judy and the volunteers from Helping Horses Sanctuary. Judy has been thankful for the public stepping up to adopt or foster most of the horses.

Judy has provided 3 promises to every horse in the sanctuary program upon arrival. The weight of these words has built the foundation of the organization. The promises were:

* “There will be no more beatings, electricity, and use of performance enhancing drugs, hollering, or any other type of inhumane treatment. There will be plenty of respect.”
* “There will be no more hunger. There will always be food and water available.”
* “There will be no more moving to another farm, fighting for a place in a new herd, or getting used to another routine or the taste of other water. This is home. Forever. Even in death you will not leave the farm.”

Each horse has been given these three promises in a sentimental ceremony performed by Judy with volunteers as witnesses.

Without more committed volunteers and new fundraising initiatives, Helping Horses Sanctuary was in a precarious position. An effective training process for fundraising was critical for survival of Helping Horses.

**Reputation**

The reputation of Helping Horses has been highlighted in the success stories of adopted horses and rehabilitated horses posted on the website or illustrated in the annual calendar. Every year these success stories were displayed in a calendar that featured photographs of the horses along with their stories. The calendar had been an important part of the fundraising program, but had not generated enough income to offset the growing expenses.

The general public had the perception that Helping Horses was a riding stable and that the sanctuary was open 24/7. As a result, visitors have arrived unannounced with the expectation that Helping Horses provided riding equipment, tack and lessons for interested parties. Generally the public has been unaware the horses at the sanctuary had numerous health issues. Many of the horses were blind; most had joint and musculoskeletal mobility problems, and/or terminal diseases. Located on a busy highway, Judy has returned to the Sanctuary after errands and found a horse in one of the stalls and at other times several horses in her corral. There was no gate to close the driveway for Helping Horses Sanctuary. The estimated cost for an automatic gate ranged from $2600 to $5000, a price beyond the Sanctuary’s means.

Most of the horses were removed or surrendered to Helping Horses due to a variety of situational factors, such as: lack of feed, water, and hay; starvation; neglect; or abuse. In addition, Helping Horses Sanctuary has been the organization that law enforcement has turned to for animal seizures, foreclosure, and animal abandonment situations.

**Organizational Culture**

In addition to the purpose and mission of the sanctuary, Judy emphasized the adherence to rules, expectations of animal care, dedication to the mission, and the safety of volunteers and guests. There was a strong sense of family, obligation, and dedication to the horses among the volunteers. The organization had a website with stories and profiles of horses, past and present. Judy maintained a weekly blog which was posted on the website. In addition, there was an online store, online capability for donations, and a bulletin board for the public to post notifications of horses needing adoption, fostering, and/or sponsorship.

A Board of Directors was involved in decisions and strategic planning. The board had provided support to Judy and the mission of the sanctuary. Three years ago, a controversy arose centered on the cost of veterinary care of a blind sanctuary horse that reached upwards of $20,000 in veterinary bills in an effort to prolong its life. Judy approved the decision to provide care without contacting or involving Board members even though the bylaws recommended that action. This incident increased tensions between the Judy and the Board of Directors. The controversy resulted in the voluntary resignation of a Board member and officer at the next board meeting. At the Annual Board meeting, two years ago, the controversy was the focal point of discussion. The Board of Directors verbally stated their intent to resign as soon as a new board was in place. Their recommendation was that the new Board included representatives from the following disciplines: veterinary medicine, law, finance, fundraising, education, and the ministry. The new Board structure was implemented the following May.

**Volunteer Population**

Helping Horses Sanctuary relied on an Executive Director and an all-volunteer staff, unpaid staff. The average demographic profile of a Helping Horses volunteer was primarily female with an age range of 55-65+. There have been a total of 45 volunteers on the roster, of which only 7 to 10 volunteers were regularly active. These more regular volunteers have been involved in the daily operations of the farm, ground maintenance, and fundraising. While volunteers specialized in areas of interest, they were expected to participate in the daily operations, ground maintenance, and fundraising activities. These expectations were clearly stated on the volunteer application form and reviewed at the Annual Volunteer Safety Training held in March of each year.

Six months ago, Judy identified a list of daily “farm chores” that outlined the duties of a volunteer. Volunteers were critical for fundraising efforts and survival of Helping Horses. There were several incidents over six months where volunteers were no-shows for agreed upon volunteer assignments. This has left Judy alone without assistance and as a result she had re-injured her knee.

The daily chore list was implemented by Judy to provide clarity of the expectations and duties for volunteers in terms of safe horse handling practices. The list was sent out to the e-mail distribution list of volunteers and volunteers were asked for feedback two months prior to the Annual Volunteer Safety Training meeting. No feedback was received from the volunteer population so Judy assumed the volunteers were in agreement.

* Hooking – getting the horses in position for feeding (morning)
* Feeding (morning)
* Administering Medications (once a day)
* Checking/filling stock tanks (once a day)
* hooking (evening)
* feeding (evening)
* Cleaning stalls/barn (as needed)
* Moving hay bales into pastures (as needed)
* Cleaning stock tanks (as needed)
* Checking port-a-potties (as needed)
* Blanketing horses (weather/season depending)
* Garden – weeding
* Garden - mowing lawn

In addition to the above list of chores, volunteers were expected to “brush” the horses, but only after the daily chores were completed. Volunteers stated this was one of their favorite chores since it gave them time to bond with the horses and provided volunteers an opportunity to give individual attention to the horses. While the brushing of horses has been important for the care of each horse, there has been a sector of the volunteer population that believed this was the primary task of a volunteer. From the volunteer’s viewpoint, these met their volunteer obligation and contribution to the organization and were not interested performing the chores on the list. Judy was frustrated and angry at this and at the Annual Volunteer Safety Training. Judy stated that “if brushing horses was all that volunteers wanted to do, then there may no longer a role at Helping Horses for you.” Judy quickly apologized in an e-mail to the volunteer distribution list a few days later.

Other efforts to clarify volunteer roles and responsibilities have been attempted. Two years ago, a formal volunteer job description was developed (see Appendix A). Fundraising was formally included as a component of a volunteer’s job responsibility. However, the volunteers as well as Judy have had limited formal training on the policies and procedures and how to effectively fundraise.

Judy Bronson was aware of several opportunities for improvement for the organization, including: training, orientation, and fundraising, as well as the recruitment and retention of volunteers. At the Annual Safety Training Meeting in March, Judy attempted to provide training focused for large scale fundraising activities that used the Benevon Model™ (<http://www.benevon.com>). The all-day training event was provided by a Benevon™ representative for no charge. Volunteers were not interested in the training and raised questions about why there was a need for such training. Two volunteers walked out of the meeting and resigned as volunteers. They stated they were not interested in “asking” for money or cold calling for donations. The tension observed in the room during the training was palpable and emotions ran high. The training on the Benevon™ model was suspended approximately half way through the meeting. As a result, the Benevon™ model was abandoned. Volunteers resorted to fundraising avenues used in the past: donation canisters, raffle tickets, garden bulb sales, cheesecake sales, etc. Meanwhile, the cost of hay, veterinary expenses, and daily operations continued to rise beyond what had been budgeted. This resulted in large credit balances for necessary services.

Judy also sustained a moderately debilitating knee injury with subsequent re-injury. This injury has impacted her ability to manage the daily chore and care management needs. Both incidences happened when Judy was alone working with the horses due to lack of volunteers. Three of the active volunteers have now stepped into larger daily chore roles, but the remaining volunteer population has shown limited interest despite repeated requests.

**Public Relations**

Most of Helping Horses’ marketing and publicity has been conducted through the organization’s website, mailings, and word-of-mouth. Several small fundraising events were held each year to attract attendees and donations. These efforts were completed using small scale direct purchase fundraising methods: donation canisters at local businesses, garden bulb sales, garage sales, cheesecake sales, etc. Such fundraising efforts raised an average of $200 to $300 per initiative. Community events such as pancake breakfasts have been held twice per year in partnership with a national restaurant chain and have often raised $1500 per event. A Fall Gala with a silent auction has been held in a larger metropolitan area, approximately 75 miles from the sanctuary. The Gala’s average net profit per year had ranged from $500 to $3,000; however it had significantly decreased in revenue and attendance the past few years.

**Capital Needs**

There was a need for a new heated barn structure (horse hospital) with stalls for horse handling, shelter, and medical care facilities. Without a facility two horses were sponsored at a University Equine Hospital during the winter months. The boarding fees for these horses ranged from $1,500 to $3,000 per horse per month.

Judy had been advised by her insurance company to avoid using the cinderblock barn due to structural instability. The current building fund had only $2,500. The cost of the horse hospital building was projected to be $120,000 and included basic stalls, an office, shower, and lockers for volunteers. Currently, volunteers arrived already dressed in their volunteer -shirts or have changed in Judy’s private residence on the property.

**Financial Stability**

The Helping Horses Sanctuary relied on the work of volunteers, donated services, and monetary donations. The organization operated on a limited budget comprised of fundraising proceeds, donations, and grants. The budget for the past fiscal year was $104,000 (the budget included prior year’s unpaid expenses for hay, veterinary bills, etc.). The majority of this budget provided daily maintenance services for the horses. The budget included $3,000 for veterinary care. Veterinary costs regularly exceeded the budget due to the health needs of several horses in the herd. This resulted in a significant budget deficit.

In addition, an economic downturn has increased the number of horses needing rescue while donations have decreased. Environmental drought conditions in other parts of the U.S. increased the cost of hay purchased locally, from $2.00 to more than $9.00 per small square bale (50 lbs) and $160.00 per 1 ton round bale. The average number of bales of hay used per winter season for feeding has been approximately 3000 square and round bales. Judy has believed that the solution to the budget shortfalls would resolve themselves if fundraising efforts were significantly increased.

**Conclusion**

Helping Horses Sanctuary has struggled financially while donations and fundraising have declined. The care management needs and expenses of the herd had increased exponentially. The volunteer workforce had increased in median age. In addition, there were fewer volunteers to assist with chores. Resistance to change and a difference of opinion (among volunteers) about the roles and responsibilities of volunteers at Helping Horses has remained, despite Judy’s efforts to clarify and set expectations. Volunteers were resistant to training in fundraising efforts that would net a larger monetary rate of return with less effort. This placed increased stress on Judy that has impacted the future of Helping Horses Sanctuary.

**Call to Action**

Fundraising had to be increased to survive. Volunteers were essential to the survival of the sanctuary. What should Judy do to meet the increased funding needed for the care of the horses and the operation? What should Judy do to increase volunteer training, specifically related to fundraising? How was she going to provide the training needed to increase fundraising efforts? What type of training did the group need? What fundraising activities would be successful with the limited time and volunteer resources? How will she address volunteer resistance to training? What should Judy do? Where do you project Judy and Helping Horses will be organizationally and financially as a result of the training efforts?

Appendix A

Helping Horses Volunteer Job Description

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Job Title:** | | Volunteer | | **Will Train? Yes** | | | |
| **Location:** | |  | | **Travel Required:** | | | Minimal | |
| **External posting URL:** | |  | | | | | | |
| **Internal posting URL:** | |  | | | | | | |
| **Applications Accepted By:** | | | | | | | | |
| **Fax or E-mail:** | | | Mail:  Helping Horses Sanctuary 1234 Anywhere  Rural Midwest Location | | | | | |
| **Job Description** | | | | | | | | |
| **Role and Responsibilities**   1. Volunteers are to understand and embody the mission of Helping Horses Sanctuary. Volunteers are expected to work closely with horses, and must have a passion for facilitating the transformation processes for all beings at Helping Horses Sanctuary 2. Essential Tasks    1. Volunteers will use their own unique skills in order to improve Helping Horses Sanctuary.    2. Volunteers will know and understand the ways of the farm along with any other safety trainings or information.    3. Volunteers will help maintain a positive relationship with the public.    4. Volunteers are responsible for the general maintenance of Helping Horses Sanctuary. This includes cleaning barns, grooming horses, minor repairs, etc.    5. Volunteers will be involved in some aspect of fundraising. Aspects of fundraising include planning events, volunteering at fundraising events, obtaining money from the public, etc.    6. Volunteers will pass information on to new volunteers as needed, and help to mentor new volunteers.    7. Any other activities assigned to the volunteer by the Executive Director of Helping Horses Sanctuary.   **Qualifications**   1. Maintain a passion for working with horses and all beings on the farm. 2. Good communication skills between other volunteers and the management of Helping Horses Sanctuary. 3. Ability to work as part of a team. 4. Maintain an emotional balance.   **Organizational Ethics**   1. Honesty—Be able to communicate and directly with both volunteers and management of Helping Horses Sanctuary. 2. Selflessness—Be willing to whatever is needed in order to accomplish the goals of Helping Horses Sanctuary. 3. Passion—Maintain an overall enjoyment from working with, and helping to transform, all of the beings at Helping Horses Sanctuary.   **Personal Contributions**   1. Unique skills—Volunteers will use their unique skills to help Helping Horses Sanctuary accomplish its goals. 2. Time—Volunteers should want to contribute their time to Helping Horses Sanctuary 3. Enjoyment | | | | | | | | |
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