Appendix A

Sample Business Plan

1.0 Executive Summary

*Rescue Group* is a nonprofit 501(c)(3) volunteer-based animal welfare organization dedicated to rescuing homeless dogs and cats from overcrowded shelters. By working with a network of volunteer advocates, foster caregivers, local veterinarians, trainers and shelters, *Rescue Group* is able to rescue hundreds of animals every year. We provide these animals with care and temporary homes until we can place them into their permanent homes. We also serve as a resource to our community by providing information on pet ownership, including resources for spay/neuter, positive behavior training, nutrition and veterinary care. We believe that no animal should be mistreated and are working towards the day when no companion animal is euthanized for lack of a home.

*Rescue Group* was founded in 2014 by a group of animal advocates in *Region* after learning that the area had been inundated with stray and relinquished animals. *Rescue Group* formed to rescue as many stray and homeless animals as possible by partnering with *Local Shelter*. In addition to transferring homeless animals from *Local Shelter*, fostering the animals in temporary homes and adopting them out, we also provide behavioral and medical resources to people who are considering surrendering their pet in an effort to keep the pets in their homes and out of the shelter system. We also have partnered with *Local Pet Store*, which provides us with six cat cages at their facility on *Address*.

1.1 Board of Directors

The Board of Directors of *Rescue Group* consists of five individuals from varying backgrounds. *Jane Doe* is president of the board. Ms. Doe has over 15 years of experience in the marketing world as a senior consultant for ABC Corporation. *John Smith* is the vice president of the board and has worked as a licensed social worker for the past seven years. *Jack Jones* is the board secretary and has been employed as a licensed attorney for over five years. *Robin Roe* is the board treasurer and has served as a licensed CPA for over 11 years. *Mary Thompson* has worked as a licensed attorney for the past 10 years and has been certified as a dog trainer for the past three years.

1.2 Organizational Structure

*Rescue Group* is organized exclusively for charitable and educational purposes of companion animal rescue. The organization is not-for-profit and obtained 501(c)(3) status from the IRS in 2014. We are committed to fiscal responsibility and conduct independent audits in compliance with state law.

THE HUMANE SOCIETY
OF THE UNITED STATES

Provided by The Humane Society of the United States
animalsheltering.org/rescuebestpractices
Maggie Johnson serves as the executive director of Rescue Group, running the day-to-day operations. In addition to Ms. Johnson, the organization has an all-volunteer staff consisting of two records managers, two surrender prevention counselors, two adoption coordinators, three foster coordinators, three medical coordinators, one volunteer coordinator, one facility director, two event coordinators (for adoption events), one fundraising coordinator and one grants coordinator. The volunteer coordinator is responsible for recruiting volunteers to help the other coordinators carry out their tasks as well as managing the volunteer program. Rescue Group hopes to partner with more pet stores in the future to provide more spaces to keep some of the organization’s animals. As we obtain additional space, the organization will also expand its staff and volunteer base.

As executive director, Ms. Johnson is paid a salary that is set by the board of directors. This is the only paid position for Rescue Group.

2.0 Services

Rescue Group fosters and adopts out dogs and cats who are currently homeless. All animals in our care are tested for common diseases, assessed behaviorally, provided with necessary medical care, vaccinated and altered before they are adopted into permanent homes. We have several volunteers who are knowledgeable about common dog and cat behavior issues and are available to advise all foster providers and adopters.

For our surrender prevention program, in addition to our on-staff behavior experts, we have relationships with trainers that we can refer people to when needed. Our surrender prevention counselors work with Local Shelter and have a booth directly by the entrance of Local Shelter. On the weekends our volunteers sit at the booth and work with people coming to surrender their pet and try to resolve any issues so that the pet can stay in its home. To accomplish this, we partner with other community resources such as low cost spay/neuter clinics, veterinarians who are willing to give us a discount, pet food pantries and legal advocates who are familiar with local housing laws.

Good customer service is a cornerstone of our philosophy. We want every person who encounters the organization to feel like he or she has been folded into our family. We also want to get the animals out of our care and into their permanent homes as quickly as possible so that we may save even more lives. We are committed to making the adoption process as seamless as possible.

2.1 Intake and Humane Capacity

Rescue Group obtains nearly all its animals from Local Shelter. Local Shelter employees send the executive director a list of animals that are not doing well in the shelter environment or
need specialized care. We take as many animals as we can while still ensuring that all animals under our care are receiving all Five Freedoms. In return for taking difficult cases, *Local Shelter* lets us choose other easier animals that we bring into our organization. We take care to ensure that we are not overwhelmed with the number of difficult cases or animals in general. We do not accept owner surrenders. While we will always take back an animal we adopted out, we provide resources to encourage adopters to rehome the animal on their own and ask them to send us the updated contact information for the new adopter.

*Rescue Group* takes care to ensure that we do not exceed our humane capacity, which means that animals are provided with all Five Freedoms while in our care. We have ongoing conversations with foster providers to determine their capacity and we do not exceed those limitations. Specifically, we consider the number of pets in a home (their own plus any fosters), special medical issues, special behavior issues, pregnant animals, mothers and their babies as well as other issues. Once we are at capacity, we do not bring any additional animals into the rescue until a space at an appropriate foster home opens up or we recruit a new foster provider. We also ask foster providers to send the foster coordinator a brief weekly report with any health or behavior concerns so that we can stay ahead of any problems.

### 2.2 Adoptions

Our goal this year is to place *Number* of animals in permanent homes, a *X%* increase/decrease from last year. In addition to promoting animals through our website and social media channels, the main way for potential adopters to meet and adopt our animals is through our two weekly adoption events: one for cats at *Location* and one for dogs at *Location*. We try to have between 12–18 cats and 10–15 dogs at their respective adoption events. We would like to hold more adoption events on the weekends and are actively looking for volunteers interested in running adoption events.

All animals attending the adoption event are current on their shots and free of any communicable illnesses. Animals should be in our organization and healthy before they are allowed to attend an adoption event. We generally require that all animals attending an adoption event behave well in unfamiliar areas and can co-exist with other animals. We will not allow, for example, a dog to attend an adoption event if that dog is highly reactive to other animals. Cats need not be as well socialized with other animals as they are all in cages for the duration of the event, unless a potential adopter is interested in meeting one.

For foster providers who choose not to or are unable to attend adoption events, we have a listserv that foster providers use to arrange for carpools to ensure that adoptable pets are
available at events. This ensures exposure to the animals that otherwise would not make it to adoption events. For animals that do not go to adoption events, we help foster providers get their charges adopted through other advertising channels, such as continued promotion on our Facebook page. We also have a “Pet of the Week” feature on our website that allows us to highlight animals that are having a difficult time finding their permanent home.

2.3 Fostering

Fostering animals in need of permanent homes is an essential part of this organization. Indeed, without our large network of foster homes, *Rescue Group* would have been unable to take in the vast majority of animals that have found their permanent homes through the organization.

Once foster caregivers go through an orientation process, animals may be delivered to their homes. We also provide foster providers with a handbook that clearly lays out the expectations of care, contains contact information for emergencies and questions, includes a list of frequently asked questions to help resolve common behavior and medical issues as well as offers tips on how to get their charges adopted. We will always find a new foster home for a pet when requested by a foster provider.

Foster responsibilities and procedures are set forth in detail in the foster manual that is provided to every foster provider before they bring any of our animals into their home.

2.4 Humane Education/Surrender Prevention

While our goal is to get as many pets into homes as possible, we want to keep them there for the remainder of the pets’ lives. To that end, *Rescue Group* has developed resources to help pet owners resolve the most common behavior and medical issues. We provide a weekly 45-minute in-person seminar on pet behavior and nutrition for all adopters and foster providers who would like the information, and also have someone on staff who is knowledgeable concerning animal behavior. We hope to have a certified animal behavior expert on staff in the future.

When an adopter wants to return a pet or when a member of the public wants to surrender a pet, we first attempt to resolve the issue by providing behavior and medical resources. If that does not work, we will always take back a pet we have adopted out. If we do not have room for a pet surrendered by the general public, we refer the individual to other local rescue groups as well as the local shelter.

3.0 Market Analysis

According to The Humane Society of the United States, approximately 2.4 million healthy,
adoptive companion animals are euthanized in the United States annually. The goal of *Rescue Group* is to help every homeless pet in our community find a home and reduce the number of companion animals that are euthanized. We know we cannot do this on our own and have enlisted the help and resources of other local rescue groups, trap-neuter/spay-return (“TNR”) groups, spay/neuter clinics, veterinarians, the local shelter and other community advocates to help reduce the number of homeless animals, find new homes for ones that are in need and prevent pets from being surrendered into the shelter and rescue group system in the first place.

**SWOT Analysis**

**Strengths:**
- Provide *Local Shelter* with another outlet to help with their surplus of animals
- Work collaboratively with other organizations to increase chance of reducing the homeless animal population on a community level
- Overhead is reduced by dispersing animals into foster homes as opposed to having a central facility

**Weaknesses:**
- As a foster-based organization, we do not currently provide any services that actually address the root causes of pet homelessness
- Requires a significant amount of funding dependent on donations and fundraising events
- Requires significant dedication from a volunteer staff

**Opportunities:**
- Build additional relationships with community animal advocacy groups
- Increase staff and volunteer knowledge regarding community education
- Increase presence in economically disadvantaged and senior populations
- Can grow the organization without space constraints based on the number of foster homes available

**Threats:**
- We currently provide the same services for homeless animals as numerous other organizations in the community with little distinction for our organization
- Failing to acquire necessary funding to sustain the program will limit the number and type of medical cases that we can treat
- Failing to properly manage and sustain a team of volunteer staff and foster providers will limit our ability to run the organization effectively
- Failing to maintain capacity will cause harm to the animals

**4.0 Funding**
*Rescue Group* will fund its operations with adoption fees, fundraising events, donations, corporate matching programs and grants. With the exception of the executive director, all other staff positions are unpaid. As such, the vast majority of funds will go towards either caring for the animals in our charge or enhancing and expanding the organization’s operations. Adoption fees are expected to account for approximately 20% of income.

In general, foster providers are expected to provide their own resources for the daily care of their foster dog or cat (e.g., food, bowls, litter, litter pans, toys). *Rescue Group* will provide collars, leashes and all veterinary care, as long as the foster uses the approved veterinarians. These expectations are clearly explained to foster providers both in person and in the foster manual. The organization will keep supplies on hand for emergency situations. Additionally, *Pet Store Location* has agreed to provide all supplies (e.g., food, litter, litter pans, toys, cleaning supplies) for the cats that we keep in their store. We will need to supply only bedding, food and water bowls for the animals at that location, as well as certain additional supplies (e.g., towels, gloves for handling cats, specific cleaners).

As such, the bulk of our expenses will be for veterinary care, trainers, transport, adoption events and advertising. We have teamed up with two local veterinarians who give us highly discounted rates. Additionally, we have all animals altered through the local shelter (where we have it done at cost), a local high volume spay/neuter clinic or through one of our partner veterinarians at a much reduced rate.

The budget for 2015 is found at Appendix B.

4.1 Marketing Plan and Strategy

Our marketing strategy is based on exposure from social media as well as developing relationships with local vendors and media outlets.

*Rescue Group* has registered the domain name *www.rescuegroup.org* and *www.rescuegroup.com*. The website contains all the basic information regarding the organization (e.g., tax-exempt status, contact information, who we are, adoptable animals, where the animals come from, adoption application, request for volunteers, request for donations).

We utilize Facebook, Twitter, Vine and Instagram to promote our animals, adoption events and fundraisers as well as to request donations. Our goal is to achieve a growth of 2,000 followers by the end of the year and raise $50,000 for both general funding and specific medical cases. We also created a quarterly newsletter that we send to supporters. The newsletter includes updates on some of the animals we have saved, pet behavior tips and other general information about the
organization. Each newsletter has a call to action requesting a donation, which has been a successful way to raise funds thus far.

One of our staff members is a hobbyist photographer and she is in charge of photographing animals during the weekly adoption events. Fosters are responsible for providing pictures of their charges and can request a photo shoot with the staff photographer.

In terms of volunteers, donors, foster providers and adopters, people in the local community are our target audience. We plan on partnering with local stores (not just pet stores, but also grocery stores, big box stores and community centers) to post flyers in order to reach this population.

We have contacts with the following media outlets:

- *City Post*
- *Local Almanac*
- *Weekly Standard*
- *Daily Ledger*

We have the following marketing goals for 2015:

**Goal:** To increase the number of online supporters by 25% to find new adopters and donors.

- Target Audience: online communications
  - Strategy 1: Revamp our website
  - Strategy 2: Plan and schedule for online postings for at least one per day
  - Strategy 3: Ask adopters to review the organization on Yelp
  - Strategy 4: Start a blog dealing with pet issues
- Performance Measure: We had *X* online supporters on January 1 and would like to have *X* by the end of the year.

**Goal:** To increase partnerships. We have *X* now and would like to increase it to *X* by the end of the year.

- Target Audience: local vendors
  - Strategy 1: Schedule meetings with 10 local vendors
  - Strategy 2: Schedule meetings with local clergy members
  - Strategy 3: Plan adoption events in different parts of the community
- Performance Measure: Number of corporate partnerships in a year

**Goal:** To increase media coverage to at least 5 stories in media in 2015 to grow public awareness about the organization.
• Target Audience: TV, newspaper, online communications and general public
  o Strategy 1: Send out press releases
  o Strategy 2: Schedule media interviews
  o Strategy 3: Cultivate relationships with the media to become a resource for specific issues
  o Strategy 4: Schedule a presentation before the newspaper editorial board discussing the agency and its issues.

• Performance Measure: We would like to have \( \times \) stories in the media by the end of the year.

4.2 Fundraisers

*Sally Jones*, the current fundraising coordinator, is in charge of forming an event planning committee, coming up with ideas for fundraisers and implementing the plans. She has worked as an event planner for the past six years and has significant experience in this arena. Heading the fundraising committee, *Sally Jones* will submit a fundraising plan which lays out the proposed events over the calendar year, how much each event will cost in terms of volunteers and funding and the amount we expect to raise from each event.

Our goal this year is to hold four small events and one major event bringing in $50,000 in total. We will reach out to local businesses to partner with them on these events as well as garner community support.

We also utilize an amazon.com wish list, which allows us to create a list of the exact items *Rescue Group* needs. Donors can purchase items directly off the list and they are sent to the organization. We have found that many donors feel more comfortable purchasing specific items than donating money. The organization gains additional revenue through the AmazonSmile program, which allows supporters who shop on amazon.com to select *Rescue Group* to receive a small portion of the price they pay for items purchased.

We will also solicit donations during adoption events by setting up a tip jar along by the event tables as well as having a flyer listing the supplies we need. As the adoption events take place in local pet stores, those managers have agreed to post a sign at the cash registers during events asking if patrons would like to donate to our organization.

4.3 Grants

Large grants are difficult to come by in the animal welfare world. *George Robinson* is the current grants coordinator and he has worked as a freelance writer for the past 14 years. His role
is to research various opportunities for grants, form a team to write them, keep track of which grants have been submitted and report which are successful. The grants we apply for are consistent with our strategic plan and long-term goals. The grants coordinator will also reach out to corporations and ask them for donations, either in funding or in products. We plan on applying for at least six grants and hope to be awarded $15,000 (or the equivalent amount in products) this year.

5.0 Conclusion

Although we are a young organization, we believe that collectively we have the experience, savvy and diversity to allow *Rescue Group* to grow and flourish. While we are mindful of not overextending ourselves, we are looking forward to expanding in the future as resources allow.

For more information, please contact us at *info@rescuegroup.org*.
Appendix B

Sample Budget

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<th>REVENUE</th>
<th>2015 Budget</th>
<th>Notes</th>
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<tr>
<td>Feline Adoptions</td>
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<td>Based on 2014 numbers. Expecting increase with new partnership with pet store giving us 6 cages at their location.</td>
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<td>Based on 2014 numbers. Represents increase of 10%. Doing more surgeries at shelter should decrease cost of spay/neuter.</td>
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<tr>
<td>Vaccines</td>
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<td>Canine Food</td>
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<tr>
<td>Feline Food</td>
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<td>Only need a few sets of supplies for emergency situations</td>
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<td>Bedding/Blankets</td>
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<td>Litter and Litter Boxes</td>
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<td>Toys</td>
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<td>Food and Water Bowls</td>
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<td>Adoption Events</td>
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<td>Event</td>
<td>Expense</td>
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<td>Adoption Events</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
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Appendix C

Sample Euthanasia Policy

*Rescue Group* provides a lifetime commitment to all animals that come into our care by arranging for a foster home until they are adopted into their permanent home. While we do not euthanize any animal for time or space, unfortunately, there are some instances where euthanasia is the best or only humane option for an animal in our care. Each animal is evaluated as an individual and assessed under the circumstances as a whole. Euthanasia is only considered after an appropriate investigation of other viable and reasonable options. The following outlines the circumstances in which we consider euthanasia for an animal in our care, how that decision is made and how it will be carried out.

Circumstances that may require euthanasia

*Rescue Group* only considers euthanasia as an option for animals that are suffering mentally, emotionally or physically and have a poor prognosis; are experiencing unremitting pain or mental suffering that cannot be reasonably alleviated; or pose danger to other animals, themselves or people. Euthanasia is not an option we take lightly and it will be done only when we have determined that is the only humane option for the animal.

Medical Issues
After consulting with a veterinarian and following her recommendations, we will consider euthanasia for an animal who has a poor prognosis, will have a long and painful rehabilitation process with little chance of a meaningful recovery, has an incurable debilitating illness or is not responding to the available treatment.

Behavioral Issues
If an animal has a history of unprovoked biting and/or is exhibiting aggressive behaviors that pose unacceptable risk to other animals or people, we will consult with an ADPT certified trainer. If the behavior expert determines that the animal is unable to be rehabilitated and will continue to pose a threat to others, we will consult another behavior expert for a second opinion. If the second behavior expert agrees that the animal poses a danger to others and unable to be rehabilitated, we will euthanize the animal. In our opinion, if an animal is so aggressive that two behavior experts determine that it poses a danger to other animals and/or people, life in a sanctuary is simply not a humane option. We will not transfer an animal to another rescue group or shelter to avoid the difficult decision of having to euthanize for a behavioral issue.

How we make the decision to euthanize

For standard medical cases, we will defer to the judgment of our veterinarians in making euthanasia recommendations. For those rare, controversial medical cases where the animal’s quality of life may be unclear, the board of directors and executive director will convene to
evaluate the data, consult other resources if necessary and make a determination by a simple majority vote. The foster provider for the animal in question will also be allowed to participate in the discussion and request a vote.

**How the animal is euthanized**

The foster provider or another representative from *Rescue Group* will be responsible for taking the animal to one of the organization’s partner veterinarians for euthanasia. Whenever possible and appropriate, the foster provider or other representative from *Rescue Group* will remain with the animal during the entire process.
Appendix D

Sample Intake Plan

*Rescue Group* is a limited-intake organization, meaning that when the organization is at full-capacity, we are unable to accept any additional animals until an animal is adopted into a permanent home or we recruit an additional foster home.

All newly arrived animals, even those who go straight to foster homes where the home itself or a room within the home is the primary enclosure, must be isolated from all other animals for a minimum of *X* hours after arrival to ensure that there are no disease concerns. During that time, it is also important that the animal is housed in an area that can be properly and easily sanitized.

Once the animal has arrived at its destination home within the organization, the facility director, foster provider or another volunteer should conduct a behavior assessment. Depending on where the animal comes from, the source shelter may be able to provide a medical assessment. Otherwise, an animal should also be medically assessed by a partner veterinarian. Observations made during the initial behavior assessment, along with any medical and identifying information, must be input into the database within five days of bringing the animal into our program. Any animal that is returned needs to be reassessed behaviorally and medically.

Information to be included in all records:

- **Identifying information:** name, species, microchip number, age, sex, breed, color, weight, distinguishing marks
- **Medical:** spay/neuter date, dates of most recent vaccinations, date of most recent rabies shot, any other medical issues
- **Behavior assessment:** Both dogs and cats should be evaluated for signs of aggression, biting, extreme fear, excessive shyness, housetraining, and any evidence of obedience training or willingness to obey commands. Animals should also be evaluated for behavior around other cats or dogs.
  - Dogs should be assessed using a behavior assessment tool. Dogs that are healthy and friendly with no need for medical or behavioral intervention should be put on the fast-track for adoption.
  - Cats should also be assessed using an assessment tool. Cats that are healthy and friendly with no need for medical or behavioral intervention should be put on the fast-track for adoption.
Any animal that needs time to improve, either medically or behaviorally, should be given sufficient time to do so. In addition, an individualized medical or behavioral plan should be created for each animal by the adoption counselor in conjunction with veterinarians, behavior experts and trainers. Every foster provider should be given a realistic assessment for the length of time an animal will need specialized care before the pet can be put on the fast-track for adoption. Once ready for adoption, the animal should attend as many adoption events as possible and be promoted heavily using social media.
Appendix E

Owner Surrender Information

Collect the following information on every owner-surrendered pet your rescue takes in:

- Basic information
  - Name, address and contact information of all owners
  - Name, species, breed, sex, color, markings, age and weight of animal
  - Reasons the animal is being surrendered
  - Whether the pet is microchipped and, if so, the chip number
  - Type, brand and amount of food the animal eats
  - Activity level

- Medical information
  - Name and contact information of veterinarian
  - All veterinary records
  - Whether the pet is spayed or neutered
  - Date of most recent rabies shot
  - Date of most recent vaccinations
  - Any medical issues, including heartworm, distemper, FIV or FeLV

- Behavior information
  - Any behavior issues
  - If the animal has lived with children or other pets and, if so, how the animal behaves with them
  - How the animal behaves around strangers
  - Any housetraining issues
  - Any prior bite issues
  - Any behavior training completed

*Disclaimer: As with any legal document, it is important to consult with an attorney licensed in your state and familiar with animal law to ensure that your contract adequately protects your organization and complies with local, state and federal laws.*
Appendix F

Temporary Owner Surrender Information

In the case of a temporary owner surrender, your organization should collect all of the data noted in Appendix E, as well as consider:

- The length of time the owner estimates will lapse until he will be able to take his pet home and resume caring for the animal
- Whether you should charge the owner a small fee. Having the owner pay a nominal amount can help keep the relationship between the owner and the pet alive.
- How often the owner should or can contact the organization and/or the pet. Having the person stay in contact with the rescue group and the pet is important in keeping the human-animal bond strong, even during the physical separation.
- What happens if the owner does not come to pick up his pet after the agreed upon date? At what point do you consider the pet abandoned?
- An emergency contact for the animal in case there is an issue and the owner cannot be reached.

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