

SURF & TURF THERAPY

ANNUAL REPORT
2022



Our mission at Surf and Turf Therapy is to be committed to bettering lives through non-traditional therapeutic activities.

WELCOME

DR JILLIAN STEWART

FOUNDER | EXECUTIVE DIRECTOR

It is hard to believe we have been serving our community for four years already and have no plans to stop any time soon! Each year I look forward to developing this annual report, as it has become a time to reflect on just how much our amazing community helps our program succeed and serve! In our first four years we were met with some unique challenges and every time our community is right there to help and ensure we are able to keep serving. In the spring of 2022 the Equine Herpes Virus, a highly contagious and dangerous respiratory disease in horses shut down the local equestrian community, including our ranch, for nearly two months. Our community did not waiver and we were able to keep our entire herd healthy, while continuing to serve both in the surf and with land based community integration opportunities at local parks.

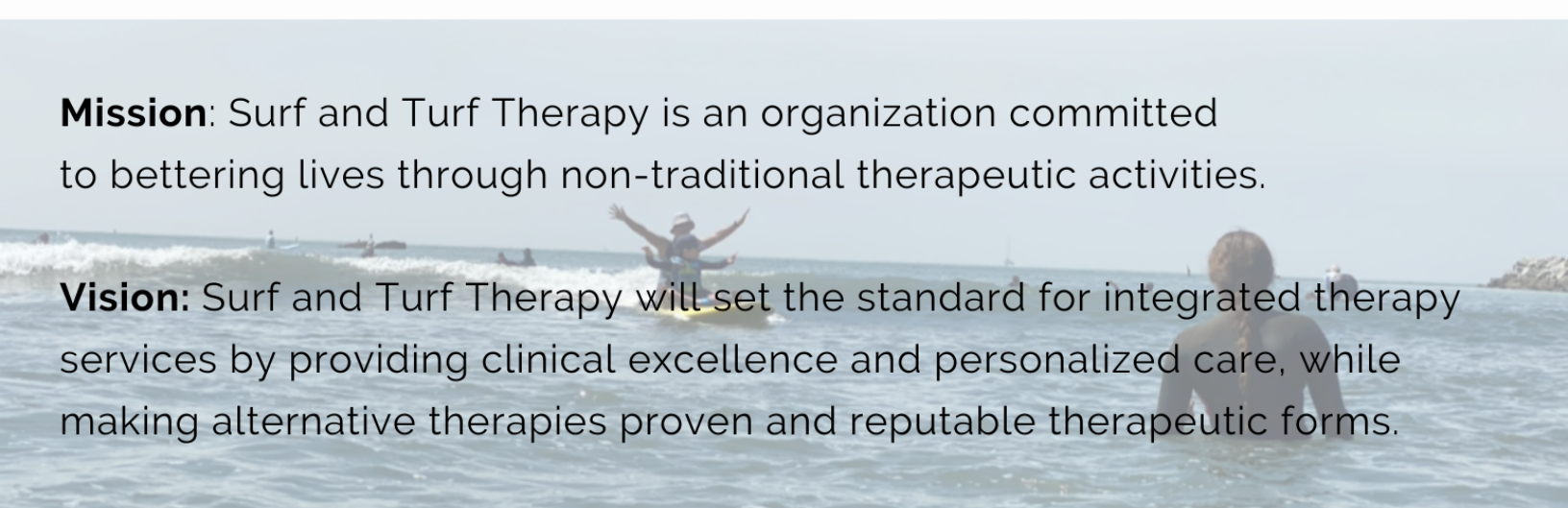
Our physical and occupational therapy programs using surfing, horseback riding and community settings continued to serve individuals with disabilities as our largest program, at just over 70% of our service hour focus. And while our focus in 2022 was on sustainability and taking steps to ensure our programs remain for years to come, we can not help but work to meet the needs of our community - which lead to our our therapeutic riding program growing to nearly 10% of our service provided and we are proud to have 11% of our service hours committed to providing free horsemanship courses and surf lessons to children from low income, underserved neighborhoods in San Juan Capistrano through our partnership with Unidos South OC.

Thanks to our incredible community we were able to meet or make progress toward all goals set in 2022. A grant from the Orange County Youth Sports Foundation funded the purchase of a beach wheelchair, allowing individuals with mobility needs easier access to and from the beach. Dave Myrick and The Donchess Family helped ensure the health and sustainability of our herd by sponsoring full time program horses Emma and May. We met the continued demand for services by growing our staff - hiring part time occupational therapist Dr. Alex Heumann and surf aide Luke Vicelja. In April, physical therapist Dr. Jaime Little officially joined the team to help build our first new chapter in San Diego, after she spent a year volunteering and training with our surf program in Orange County to learn our methods before launching.

In addition to meeting those goals, we experienced some wonderful, unexpected accomplishments including starting the D.L. Stewart | Mark W. Jeffries Sr. oncology fund to provide free services to those actively fighting cancer, being awarded the Silver Horseshoe for best nonprofit in SJC and receiving endorsement from USA Surfing for our surf program. We were also able to add three successful events to our calendar: the first was as an honored charity at the first ever RX3 Flag Football Charity Tournament which included a generous donation to our program thanks to Roth Capital Partners. Then in May we held our first community fundraising drive in the form of a Surf A Thon - which brought together 27 surfers to catch 376 waves and raised both funding and awareness for the program, and lastly we were invited to be a part of the first ever Silverado Cup and thanks to an unbelievable sponsorship by Hot Ticket Racing we were able to make this a truly successful event, even in the first year!

I hope you enjoy flipping through these as much as I enjoy putting them together and that you feel proud to be a part of this wonderful community and please know that **WE TRULY COULD NOT DO IT WITHOUT YOU!**

- Dr. Jillian Stewart, PT, DPT, HPCS



Mission: Surf and Turf Therapy is an organization committed to bettering lives through non-traditional therapeutic activities.

Vision: Surf and Turf Therapy will set the standard for integrated therapy services by providing clinical excellence and personalized care, while making alternative therapies proven and reputable therapeutic forms.

2022 ACCOMPLISHMENTS

SAN DIEGO
CHAPTER OPENED



VOTED BEST
NONPROFIT



Surf & Turf Therapy provided nearly 3,100 opportunities in surfing, horseback riding and community integration to underserved populations, including people with disabilities and their families, as well as individuals from under-resourced communities.



ESTABLISHED
ENDOWMENT FUND



ENDORSED BY
USA SURFING



LEARN MORE & GET INVOLVED!

TID 84-2094103

www.surfandturftherapy.org

2022 IMPACT SUMMARY



92%

Under 18

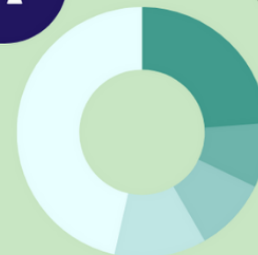
3091

Hours Served

25%

On Scholarship

Physical Therapy
46.5%



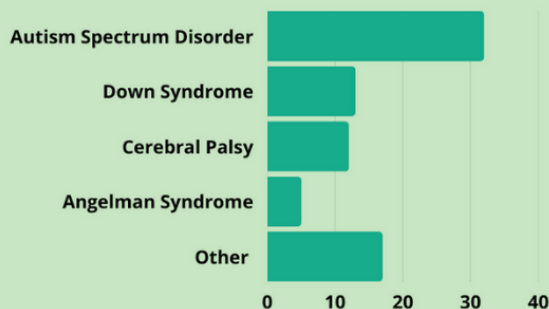
Occupational Therapy
23.8%

Sibling Support
8.3%

Therapeutic Riding
9.5%

Unidos
11.9%

Top Diagnoses Served



OUTCOMES

- 90% reported better balance
- 80% felt greater happiness
- 75% grew stronger
- 70% reported greater confidence
- 68% saw improvements in posture & coordination

Other areas of improvement included regulation & behaviors, walking, social & fine motor skills

JACOB'S STORY

Cerebral Palsy feels like you are on stilts while balancing on a beach ball. It is a daily dance between what your "plan" is then competing against your body to accomplish the tasks.

My name is Jacob Pacheco, and I was born with cerebral palsy. I am a current patient and board member of Surf & Turf Therapy. Joining Surf & Turf has been one of the best decisions I have made for my health in the last few years. I am a competitive surfer, tackling challenges without fear is what I live for. Surf & Turf was a different kind of challenge. To be honest, I feared riding horses again from traumatic childhood experiences that I avoided asking for help from Surf & Turf to my own detriment. I was falling in public often, my muscles were strong but stiff like a wooden board. Daily yoga routines had minimal improvement on permanent tension, I was tight all day, every day. It felt like a rubber band that was about to snap because it was stretched too far. I knew something had to change. If I did not change, I would eventually sustain an injury that would take me away from living my life to the fullest potential.

Thankfully, Jillian and the staff at Surf & Turf exhibited outstanding compassion, patience, and communication towards making my life better as a person first, patient second. The progress was slow at first with sore muscles I did not know existed. I was humbled and hooked after the first lesson because I felt challenged to succeed and cared for if I had any setbacks. Over time I went from an assisted rider to an independent rider capable of learning Polo! This is mainly due to Surf & Turf's commitment to maximizing my full potential as their patient: having that vision and believing in me to excel.

Since day one to today, the results speak for themselves: From assisted rider to independent rider, increased self-belief to overcome challenges and surf bigger waves. However, my muscles now have reduced tension and pain that lasts 3-4 days just from riding, add in my daily yoga routines the benefits increase to 5-7 days generally.

Surf & Turf is setting a new standard in Physical and Occupational Therapy care. Their ability to see your best potential and execute that plan of care keeps you coming back. Surf & Turf exemplifies "Human First, patient second". The results speak for themselves.





VOLUNTEER HIGHLIGHTS

In 2022, 125 volunteers served 4,237 hours

FRIENDS OF SURF & TURF

As you may know, we experienced nearly exponential growth during our initial years - increasing from 6 patients at our start in 2018, to 28 in 2019, to 45 in 2020 and up to a record 85 patients per week in 2021! To keep up with this growth and ensure our programs remained sustainable we needed more help - thus Friends of Surf & Turf was formed in 2022! This committee is comprised of 8 amazing individuals (and growing!) who are involved in a variety of ways - from fundraising and completing tasks for event planning, such as gathering silent auction items, preparing flowers or cultivating sponsors, to sharing our mission at community booths, and assisting with special projects, including improving procedures and prepping activities for our award winning summer camps. If you are interested in getting involved please email jillian@surfandturftherapy.org for more details.



All Around Volunteer of the Year: JAMIE DONCHES

Jamie is an absolute positive force on our team. She volunteers multiple days a week, often for the entire day. In fact, Jamie was kind enough to pick up more shifts on a day we were short and we later found out it was her birthday! She said with us was the best way to spend it. This is indicative of the spirit Jamie always brings to the barn, each and every week. Jamie is a member of the "Friends of Surf & Turf committee" and wears many hats in our organization, from a booth guru to the special event volunteer coordinator, and everything in between. She makes other volunteers feel welcome and takes on every task with a smile. It is beautiful to see the connection she has formed with her riders and how they smile and wave as soon as they see her! Thank you Jamie!



Above&Beyond Volunteer of the Year: HEATHER ALKON

Heather is a big help at both the barn and the beach. Every Monday morning, she is ready with a smile on her face and always stays to clean, feed the horses, walk or groom them, or do anything else asked of her. This fall, she regularly volunteered to stay an extra hour in the cold ocean to help us out with clients who are progressing to more independence. This would not have been possible without her consistently volunteering to stay extra time. Heather is also a part of our "Friends of Surf and Turf committee" which means she helps both behind and in front of the scenes with events and other happenings - and will be leading the charge of an entirely new Pickleball event in 2023. Thanks Heather!

Surf Volunteer of the Year: GAVIN REYES

Gavin is kind, consistent, great with the kids (one of them prefers to walk with him everywhere vs her therapist!), and is always looking to be present and helpful, even when it might be more fun to paddle into the lineup and catch some good waves. He is one of the few volunteers that is able to take clients tandem on the surfboard with him and has proven himself to be trustworthy and reliable time and time again. He never complains and has a good attitude, no matter what he is asked to do. He is always a step ahead and takes initiative when he is volunteering to complete tasks before being asked. Gavin has been a joy to get to know and work with, we are very grateful he spends his Sunday mornings with us. Thanks Gavin!



Turf Volunteer of the Year: ABBIE BUCKMAN

Abbie has been volunteering at Surf and Turf for over a year, and she is a bright spot every Thursday. She always jumps in wherever she is needed, whether it be as a horse leader, a side walker, for barn clean up, and even to train other volunteers. She also helped us out in the spring when we switched our treatments to a local park due to the barn closure during the EHV outbreak and was integral to the success and safety of the sessions there. All of the clients Abbie works with love her, and she has been a natural from day one. We can always count on her to make her scheduled shifts, and does so with a smile on her face. Abbie has been an amazing asset to our Surf and Turf volunteer team. Thank you Abbie!

We are looking for supportive & caring individuals to join our volunteer team!
Please contact us at volunteer@surfandturftherapy.org or 949.312.7227 to get started.

OUR TEAM

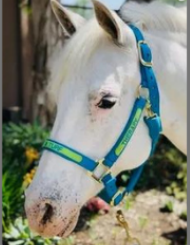
HORSE OF THE YEAR - BISCUIT



Tomahawk



Paddy



Bella



Seven



Emma



May



Dave

Biscuit is a 10 year old quarter horse who loves attention and his work as a therapy horse. He is sweet and patient, making volunteers and participants feel comfortable while they learn the ropes. His easy going yet social personality, medium size and quality movement make him an ideal horse for hippotherapy treatments. He was the first therapy horse at Surf & Turf Therapy, and our community helped fund his purchase from Cindy Forrest Performance Horses in 2021. In 2022 he provided over 330 hours of service to our community - and he truly misses the crew during breaks. Often you will catch him looking out his window while waiting for his next rider to arrive. Thank you Biscuit!



DID YOU KNOW?

Horse & patient sponsorship opportunities are available! These monthly gifts range from \$250 to \$950/month and cover the cost of care for our herd and our patient services. These sponsorships help ensure our services continue to be available for all. They are also great opportunities for our community to learn more about our herd, as well as the lives of the participants impacted by their sponsorship with the quarterly updates included for sponsors.



Horses with a star are available for sponsorship!

contact : Jillian@surfandturftherapy.org

WELCOME DAVE!

Dave is a 15 year old Buckskin Quarter horse who previously worked as a ranch horse and a pony horse at the racetrack. He has a sweet, calm personality and forward movement, making him a perfect fit for our sensory seekers. He is generously on loan by Desiree & Chris Mills. Thank you!

WE HAVE AN ALL STAR STAFF

Dr. Jillian Stewart - Founder | Executive Director

Dr. Allyson Blackstone - Doctor of Physical Therapy

Danielle Cupps - Instructor | Volunteer Coordinator

Dr. Alex Heumann - Doctor of Occupational Therapy

Dr. Emily Morton - Doctor of Occupational Therapy

Dr. Jaime Little - Doctor of Physical Therapy (SD)

Teresa Kodama - Office Administrator

Euan Latimer - Surf Aide

Luke Vicelja - Surf Aide

THANK YOU TO OUR AMAZING BOARD OF DIRECTORS

Danica Ezor - Director

Dave Myrick - Director

Darlene Rudkin - Director

Staci Stewart - Treasurer

Greg Lopez - Director

Michael Manniello - Board Chair

Danielle Ouellette - Vice Chair



"My 11 yr old autistic son has genuinely benefited from the one-on-one time with an amazing OT and being in the fresh air and water. The bond he formed with his OT has truly uplifted his spirits, brought him more confidence in the water and on a surfboard, and has been the highlight of his progression. We are very grateful to the team at Surf & Turf Therapy."

-Syndi



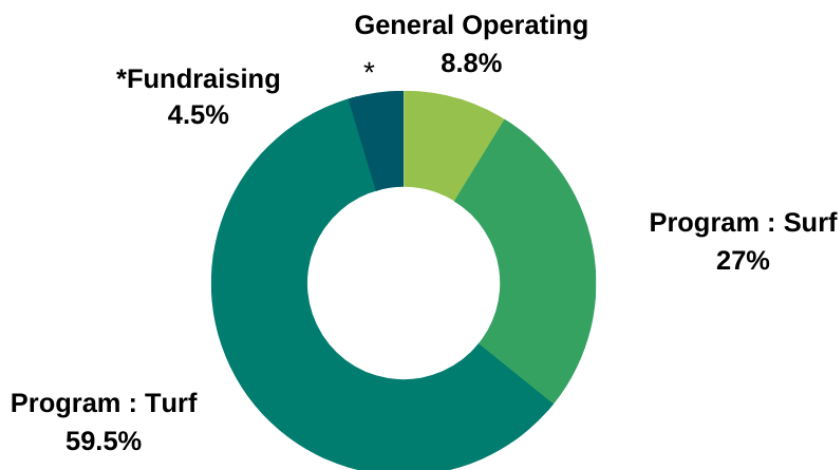
"Surf and turf has been a great experience for my son. Ethan has cerebral palsy, Blind, Autism, sensory issues, gross and motor delays, and speech delays. He has improved immensely with the kind staff and therapist, who make him feel confident and happy when riding a horse. **They are very thorough and kind individuals who have given me hope that he can participate in these types of events.** His posture, balance, and strength and his core muscle has improved. He is able to now sit on the horse with minimal support. It is a great experience seeing him have that ability. He gets excited to go to Surf & Turf and feel safe around them, which is very important for a mother who has a child with a disability. Thank you very much!!"

- Mackenzie

FINANCIAL SUMMARY

EXPENSES 2022

Total Expenses \$368,797

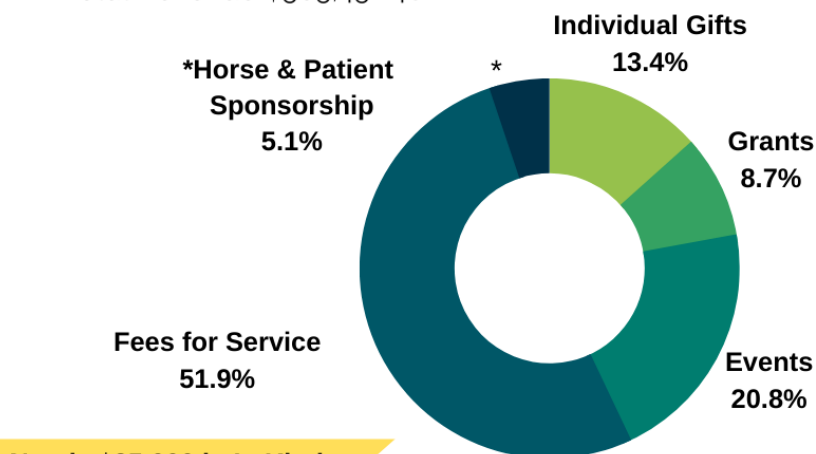


87% of our total expenses go directly toward running programs to serve our community

Thanks to our supportive community we have been able to establish an endowment fund with remaining funds. The Zandbergen Group is generously managing the fund pro-bono, to support the legacy of Surf & Turf.

REVENUE 2022

Total Revenue \$505,452.48



Nearly \$25,000 in In Kind gifts and discounts

Fees alone are not enough to cover costs
25% of participants received financial aid in 2022

EVENTS

FEB

12 patient parents enjoyed a free night out to eat, drink, connect, and play trivia.



MAR

Thank you to RX3 for hosting a wonderful flag football charity event and to Emerson Roth, Sam Darnold and the entire team, who selected S&T to receive an incredible \$15,000 gift!



MAY

Our first Surf – A – Thon had 27 surfers and countless supporters on the beach cheering them on. Our community came together to catch 376 waves and raise nearly \$10,000 support our mission!



JUNE

Our 3rd annual Movie with a Mission was a HUGE success – raising over \$10,000. Featuring a drive in showing of Moana, a carnival, barn tours and line dancing with DJ Marie Kelly!



JULY

We held 6 sold out camps, with 36 campers – WOW! Thanks to Acuity Brands and Distech Controls every camper and volunteer received a goody bag packed with essentials for the summer. A big thank you also to Electric Medics for funding scholarships for campers and to Tandm Surf for donating two Tandm Boards– a camp highlight!



SEPT

September was a busy month, kicking off with our 3rd Annual Chukkers for Charity event, which sold out and raised a record breaking \$61,000!

2 weeks later 9 S&T surfers competed in the Doheny Longboard Surfing Association contest – The Velzy. There was a luau afterward and the DLSA honored our surfers with awards as well as an incredibly generous \$1,200 gift to support our programs!



OCT

OC Polo welcomed S&T to the first Silverado Cup, presented by Hot Ticket Racing. S&T riders played an exhibition match sponsored by Dr. Sunny Park, with pro polo players coaching and over \$39,000 was raised.



DEC

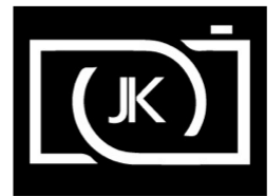
Over 30 paddlers, lead by Stacy Savage, joined in to spread Christmas cheer and raise nearly \$1,200



Thank you event sponsors & partners!



JAGUAR LAND ROVER
MISSION VIEJO



SAN JUAN CAPISTRANO
equestrian coalition



BOB & DANICA EZOR
CHEVAL ATHLETICS
DEBBIE MICHOWSKI
DAN & STACI STEWART
FRONTIER REAL ESTATE INVESTMENTS
NICOLE PALANJIAN REAL ESTATE
THE CONTAINER SUPPLY COMPANY
MAJKE EQUIPE



MADE POSSIBLE THANKS TO OUR COMMUNITY PARTNERS

Rancho Sierra Vista Equestrian Center

offering facilities for our program and barn space

Cindy Forrest Performance Horses

training & mentorship for horses & staff

Wilmont Farms - Carol Willner & Jennie Bershon

offering 2 part time therapy horses on loan

Desiree & Chris Mills

offering 2 part time therapy horses on loan

OC Polo Club - Rancho Silverado Stables

volunteer & fundraising support

Jesse Coker

farrier supporting our program horses

Mission Equine Hospital

veterinarians supporting our program horses

Joshua Kizziar

photographer for events and therapy sessions

Unidos South OC

partnering with us to reach the underserved in SJC

Hope Hattesohl

offering behavior and laser treatments to our herd



Thank you to our Donors!

Our team remains committed to our values of quality care and inclusion, providing service to those in need, regardless of ability to pay. We could not do this without the support of our generous donors. 128 people made financial and in kind contributions to support our mission in 2022!

Thank you for every gift and to everyone who contributed throughout the year.

\$5,000 or more

Acuity Brands & Distech Controls
Arthur C. Nielsen Jr. Charitable Trust
Dave Myrick
Golden Eagle Foundation
Hot Ticket Racing
Jaguar Land Rover Mission Viejo
Michael Ann & Steven Nameroff
Orange County Youth Sports Foundation
Orval & Susie Stewart Foundation
Rancho Silverado Stables
Robert & Carol Summers
ROTH Capital Partners
Sunwest Bank Charitable Foundation

\$1,000 or more

Bob & Danica Ezor
Doheny Longboard Surfing Association
Donald C. Iler
The Franklin Family
HB Tanner
Jack Wood
Jamie Donchess
Jill Price
John Rochefort
Ken & Jeannie Whitmer
Las Vaqueras
Michael Burnett
Michael Manniello
Rancho Sierra Vista Equestrian Center
Roger & Debi Brum
San Clemente Beach Angels
San Clemente Women's Club
San Juan Capistrano Equestrian Coalition

\$500 or more

Burgess Company LLC
David & Elena Flyer
Dennis Broselle
Doris Selva
Janet Knilians
Kip Kolson
Matt & Sharon Corodimas
Michael Parks
Michael & Wendy Cupps
Pippen Family
Steven Gerstner
Tandm Surf
Terri Mihalovich-Gerstner
Timothy & Cindy Neff
Work Mule
The Zandbergen Group

LOOKING FORWARD

In order to continue improving lives, our future goals remain focused on sustainability and community:

Ensure health & sustainability of our current herd

Secure horse sponsorship for Biscuit & Tomahawk

Prepare for future land purchase

Begin a capital campaign to raise funds and start searching for a forever home of Surf & Turf Therapy

Enhance community integration opportunities

Identify and partner with local businesses to ensure continuity of care, regardless of weather, as well as increase access to community resources

Expand services to the underserved

Provide scholarships to >25% of patients, maintain Stewart | Jeffries oncology fund, and secure funding for continued horsemanship and surf classes for Unidos partnership

Bennett is 4 years old with spastic quad cerebral palsy and is non-verbal. Before Surf & Turf, he has never been able to participate in a therapy session without me being right there with him. That first day, they took off on the horse, and Bennett and I both shed some tears!

But what's happened every week since then is that **he has gained not only strength and balance, but he's also gained a sense of confidence, the ability to self-regulate, and a newfound independence.** When he comes back from a ride, it's with a smile on his face. We can't thank the Surf & Turf team enough for the work that you do!

- Dana



YOU CAN HELP BETTER LIVES!

Please consider making a one time or recurring gift to support our mission

- ___ \$25 sponsors a bale of hay
- ___ \$50 sponsors a monthly hoof trim
- ___ \$100 sponsors a wetsuit
- ___ \$250 sponsors a routine vet check
- ___ \$500 1 month of therapy for a patient
- ___ \$1,000 1 month of horse care
- ___ \$2,500 1 year van insurance & maintenance
- ___ \$5,000 sponsors a patient for an entire year
- ___ \$10,000 sponsors a horse for an entire year
- ___ Other Amount:
\$ _____

Name (First & Last) : _____
(of donor, in name of another, or anonymous)

Address: _____

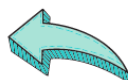
Email _____ Phone: _____

How to Donate:

Return this card with an enclosed check made to:

Surf and Turf Therapy
31441 Avenida De La Vista
San Juan Capistrano, CA 92675

Scan to donate online through our website:
<http://www.surfandturftherapy.org/donate>



Check here to make this gift monthly

Recurring gifts of all sizes help us plan for the year ahead. Whether it is \$5 or \$500, being able to plan on your support each month it makes a HUGE difference!

SURF & TURF THERAPY
31441 AVENIDA DE LA VISTA
SAN JUAN CAPISTRANO, CA 92675

