Adler Graduate School

Report of Substantive Change Progress – Move to a New Campus

Submitted to the Higher Learning Commission

December 2018

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**Progress made in launching the new campus since the original substantive change application**

On March 16th of this year, Adler Graduate School submitted a proposal to the Higher Learning Commission for a substantive change regarding the campus relocation from Richfield, MN to Minnetonka, MN. We received notice that the request had been recommended for approval on May 9th, and the application was approved by the Institutional Actions Council at the June 2018 meeting (<https://www.hlcommission.org/Student-Resources/june-2018-actions.html>). The sale of the building located at East 78th Street Richfield, MN 55423 and the purchase of the building at 10225 Yellow Circle Drive Minnetonka, MN 55343 were concluded according to schedule and on May 9th Adler Graduate School received approval of the conditional use permit by the city of Minnetonka, which allowed the remodeling process to start. Remodeling was performed according to the plans attached to the substantive change application and within the expected timeframe, and operations/classes on the new campus were initiated according to the schedule proposed on the application, on August 12th, 2018.

**Implementation of and revisions to the business plan submitted with the change application**

The school continues to operate according to the business plan that led to the campus relocation. The driving force for the move was based on our institutional effectiveness goals, with include:

**1. Exceptional Education: Provide an excellent graduate education.**

Goal 1.1: To provide an academic educational programming that meets standards of best practice.

Goal 1.2: To engage in continuous improvement driven by assessment of student learning outcomes.

Goal 1.3: To promote student professional development through student-faculty interactions in and out of the classroom

Goal 1.4: To employ highly qualified staff, faculty and administrators.

Goal 1.5: To promote faculty development that enhances teaching and supports lifelong learning.

**2. Adlerian Principles: Foster a culture that demonstrates Adlerian Principles**

Goal 2.1: To integrate Adlerian Principles into all our educational activities.

Goal 2.2: To practice Adlerian Principles throughout our campus community.

Goal 2.3: To demonstrate Adlerian Principles through community activities.

**3. Diversity: Prepare all students for service to diverse communities**

Goal 3.1: To seek out, identify, attract, and retain an increasingly diverse student body, staff, faculty, and board of directors to promote opportunities for understanding different perspectives.

Goal 3.2: To sustain, improve, and promote a sense of safety, belonging, and significance for all students.

Goal 3.3: To increase multicultural counseling awareness, knowledge, and skills through curricular experiences

Goal 3.4: To provide extra-curricular opportunities for students to develop multicultural and social justice counseling competencies.

**4. Institutional Stability: Provide resources to support institutional stability**

Goal 4.1: To ensure long-term institutional sustainability through diversified educational programming.

Goal 4.2: To monitor long-term institutional sustainability through enrollment management, tracking, and analysis.

Goal 4.3: To ensure long-term institutional sustainability through responsible resource management and development.

Goal 4.4: To provide the facilities, equipment and resources necessary for long-term institutional sustainability.

Goal 4.5: To promote long-term institutional excellence by securing and maintaining the highest level of accreditation available for all programs.

The relocation facilitates the achievement of these goals by:

* Promoting savings in operational costs, while providing better instructional and administrative spaces despite still having undeveloped space that can be used for further expansion (IE Goal 4.4; Appendix A);
* Increasing the Adler Graduate School reserve fund, as the move allowed the school to realize a gain of $1,053,000; This gain and the previous reserve fund of $1,000,000.00 are being invested in short term conservative bond investments (IE Goal 4.3) guided by the Board Finance Committee’s Charter (Appendix B) and Strategic Investment Policy (Appendix C).
* Helping to fund the school’s strategic priorities, such as
	+ Moving from an all-adjunct faculty to a full-time faculty model that aims at having highly qualified full-time faculty (IE Goals 1.1 and 1.4) who meet programmatic accreditation standards (IE Goal 4.5) and teach at least 51% of the yearly credits by the 2020-2021 academic year, and who promote student professional identity development and sense of belonging through advising (Goals 1.1 and 1.2);
	+ Providing funds for investment on human and technological resources for program assessment (IE Goals 4.2, 4.3, and 4.4);
	+ Allowing improvement of the technology for online instruction and the security and reliability of our network (IE Goals 4.3 and 4.4);
	+ Facilitating the hiring of a professional development coordinator to promote and support faculty and staff development (IE Goals 2.1 and 2.2).
	+ Facilitating the hiring of additional marketing and admissions human resources, which will contribute to the school’s long term sustainability (IE Goal 4.2).

**Institutional response to issues identified during HLC’s review and approval of the campus**

The application was approved without any issues.

**Current operations of the campus (programs, enrollment, budget, faculty, etc.)**

Adler Graduate School’s academic and fiscal year starts on July 1st, and the school is being operated according to the budget approved by the board of directors for the 2018-2019 school year. As discussed on the substantive change application, the school has operated with deficits for two consecutive years, a deficit of 11% for fiscal year 2016 and of 6% for fiscal year 2017.

As indicated in the Adler Graduate School’s most recent income statement (Appendix D), which covers from July 1st to October 31st of the current year, the projected deficit for fiscal year 2018 is once again between 6 and 11% and includes a significant increase in resources to support student learning and institutional stability.

As of November 2018, Adler Graduate School has a total of 301 students taking a total of 1602 credits in the Fall term. The school offers a total of 4 master’s level programs: Applied Adlerian Psychology, Art Therapy, Counseling, and School Counseling (IE Goal 4.1). The Counseling program offers degrees in three specialties: Clinical Mental Health, Co-Occurring Disorders, and Marriage and Family Therapy. The school also offers 2 certificates (Clinical Mental Health and Co-Occurring Disorders) and opportunities for mental health professionals whose master’s degrees do not meet licensure requirements to take the additional courses required for licensure.

In order to promote Adler Graduate School’s ability to achieve its institutional effectiveness goals, an educational model grounded on a strong full-time faculty body was implemented with the start of the 2018-2019 academic and fiscal year (IE Goal 1.4). A total of 14 faculty members were hired, all with responsibilities in the areas of teaching, service, and scholarship. These are 12-month positions and full-time faculty members are expected to teach 33 credits a year, unless they have administrative or extra-curricular responsibilities (other than advising). Faculty members with these additional responsibilities have course releases proportionate to the additional functions they perform. With the exception of the director of assessment and online education and the director of academic affairs and quality assurance, all faculty members carry an advising load, which includes academic advising as well as support in the development of professional portfolio and professional identity. Additionally, with the hiring of a full-time faculty member whose service and scholarship responsibilities revolve primarily around faculty and staff development, we expected to enhance the student experience in two significant ways: by increasing faculty and staff competence and by promoting recruitment and retention of highly qualified faculty and staff (IE Goals 1.5, 2.1, 2.2, 2.3, 3.1, and 3.2).

The gain from the sale of the old building has also made possible for the school to invest in systematic program evaluation and to develop processes to ensure the quality of online education. Under coordination by the director of assessment and online education the academic unit has developed and implemented a comprehensive program evaluation protocol that includes assessment of student learning, quality of advising, and quality of student support services (IE Goals 1.1, 1.2, and 1.3). Equally important, this director has also worked with faculty and administrators to developed and implement comprehensive policies to guide online education and has developed a training program for faculty on the use of education technology and the online teaching platform used by Adler Graduate School (Moodle; IE Goals 1.5 and 4.4). Additionally, this director has coordinated the faculty’s effort to develop a platform that allows students to develop a professional portfolio throughout their course of study at Adler Graduate School (IE Goals 1.1, 1.2, and 1.3). In addition to being developmentally based and integrative, the portfolio is likely to promote on-time graduation (Goal 4.2), as students will be supported by their advisors in the development of the portfolio and are expected to defend the portfolio simultaneously with the conclusion of their course work. Starting Fall term, all students have the option to develop this portfolio instead of writing a final master’s project.

These investments in academic human resources contribute significantly to Adler Graduate School’s ability to achieve its institutional effectiveness goal of providing an excellent graduate education (IE Goal #1). Moreover, they move the largest master’s program of the school (Counseling) significantly closer to being able to pursue the highest level available of program-specific accreditation, by the Council for Accreditation of Counseling and Related Programs (CACREP), as the alignment with academic standards, program evaluation, and institutional standards that include a minimum of full-time faculty with terminal degrees in counselor education and supervision are accreditation requirements. These changes also position the Art Therapy program favorably to seek program-specific accreditation by the Commission on Accreditation of Allied Health Education Programs (CAAHEP). This progress constitutes significant movement toward long term institutional stability (IE goal #4).

In addition to full-time faculty, Adler Graduate School has also recently hired an assistant director of admissions and a marketing and communications specialist (IE Goals 4.2 and 4.3). These additional human resources are expected to contribute significantly to the long term institutional stability, by increasing the school’s visibility and the efficacy of the new student recruitment process and by improving enrollment management, tracking, and analysis.

Not all gains realized by the campus relocation are a result of the financial gain and the consequently increased reserve fund. The new building remodeling took into consideration input from faculty and staff and the configuration of the new space was informed by and intentionally addressed instructional needs, the need for faculty and staff offices, and the best configuration to support student success and promotes the development of a sense of belonging among students, faculty, and staff. Furnishings for the new building were chosen by a committee that included staff and faculty.

The following improvements in the quality of students’, faculty’s, and staff’s experience are directly related to the new building itself:

* Students, alumni, faculty, and staff report much satisfaction with the newly remodeled building;
* The Art Therapy studio in the new building is almost twice as big as the one in the old campus (approximately 1,500 square feet) and includes a clay/kiln area;
* Each full-time faculty member has an office and there is an extra office for the use of adjunct faculty;
* The library and writing center are connected, promoting more hands-on learning and connection to the librarian to assist with information searches when students are working in the writing center;
* The library and writing center are adjacent to the faculty offices, offering more opportunities for interaction between students, student success staff, and faculty;
* The new library has 2 computers for students’ use and a work station where students can plug in their laptops, which facilitates the work of students who need library resources at hand;
* The research library (where the collection of original Adlerian hard copy resources is housed) is centrally located and adjacent to the main library, visible and accessible to students, faculty, and staff;
* The space dedicated to the writing center is larger, allowing multiple students to work at one time;
* Writing center furniture is stable and supports computers and laptops with ease, while the writing center furniture in the old campus was unstable and hindered students’ ability to work efficiently;
* The writing center space is large and allows multiple students to work at one time. In addition, writing center staff have individual offices where students can receive verbal assistance without other students hearing the writing feedback;
* There are multiple sitting areas on the first and second floors, allowing students to congregate in pairs or small groups, and there is a large cafeteria/eating area in the basement where students can get together in one or more larger groups.

**Summary**

Adler Graduate School’s relocation from Richfield, MN to Minnetonka, MN was performed according to the plan presented with the original application for substantive change. As expected, the relocation has resulted in significant improvement of the campus facilities and provided a cash reserve that allows Adler Graduate School to fulfill its Mission in “preparing mental health and human service professionals with a strong Adlerian foundation to foster encouragement, collaboration, and a sense of belonging to the individuals, families, and culturally diverse communities they serve”, and strategic initiatives set forth by the Adler Graduate School Board of Directors, by increasing human capital and technology resources to targeted areas in order to improve instruction, extra-curricular activities, student support, program evaluation, enrollment management, and marketing. These improvements, in turn, are expected to increase the quality of the student experience, promote student retention, persistence, and graduation rates and contribute to the long term growth and institutional stability, guided by the Adler Graduate School’s mission.

APPENDIX A

Operational Costs Comparison between old and New Campuses

|  |  |  |
| --- | --- | --- |
|  **Facilities Expenses** |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  | **Actual** |  | **Budget** |  |  |  | **Favorable/** |  |  |
|  | **2017-18** |  | **2018-19** |  | **Variance** |  | **Unfavorable** |  |  |
| Electrical Repairs |  -  |  |  1,000  |  |  (1,000) |  | Unfavorable |  |  |
| Elevator Contract/Repairs |  4,439  |  |  3,000  |  |  1,439  |  | Favorable |  |  |
| Fire Protection/Sprinklers |  2,722  |  |  2,000  |  |  722  |  | Favorable |  |  |
| Generator |  1,423  |  |  4,400  |  |  (2,977) |  | Unfavorable (See Note #1) |  |
| HVAC |  9,294  |  |  4,000  |  |  5,294  |  | Favorable |  |  |
| Insurance |  14,161  |  |  9,000  |  |  5,161  |  | Favorable |  |  |
| Plumbing Repairs |  1,022  |  |  3,000  |  |  (1,978) |  | Unfavorable (See Note #2) |  |
| Repairs & Maintenance |  4,067  |  |  20,000  |  |  (15,933) |  | Unfavorable (See Note #2) |  |
| Snow Removal |  20,657  |  |  10,000  |  |  10,657  |  | Favorable |  |  |
| Trash Hauling |  4,275  |  |  5,000  |  |  (725) |  | Unfavorable |  |  |
| Utilities-Electricity |  75,251  |  |  86,000  |  |  (10,749) |  | Unfavorable (See Note #3) |  |
| Utilities-Gas |  26,010  |  |  -  |  |  26,010  |  | Favorable (See Note #3) |  |
| Utilities-Water/Sewer |  10,318  |  |  7,400  |  |  2,918  |  | Favorable |  |  |
| Washroom Supplies |  3,644  |  |  4,000  |  |  (356) |  | Unfavorable |  |  |
| Water Treatment |  1,577  |  |  6,000  |  |  (4,423) |  | Unfavorable (See Note #1) |  |
| Interest Expense |  82,902  |  |  85,000  |  |  (2,098) |  | Unfavorable (See Note #4) |  |
|  |  |  |  |  |  |  |  |  |  |
| **Total** |  **261,762**  |  |  **249,800**  |  |  **11,962**  |  | **Favorable** |  |  |
|  |  |  |  |  |  |  |  |  |  |
| Note #1 - No generator in previous building, therefore, no need for water treatment |  |  |
| Note #2 - One-time expenses related to new building |  |  |  |  |  |  |
| Note #3 - Previous building was heated by natural gas; New building has electric heat |  |  |

 Note #4 - Less debt ($3.4 million vs. $2.6 million), but higher variable interest rate

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| APPENDIX BAdler Graduate SchoolBoard of Directors**Finance Committee Charter****Authority** The Committee is a committee of the Board established under Article III, Section 16 of the Adler Graduate School Bylaws. The Finance Committee assists the Board to fulfill its responsibility for ensuring Adler Graduate School’s long-term financial health and in formulating policies regarding, making decisions about and overseeing the institution’s financial performance and condition**Objectives**The Committee will direct and oversee Adler Graduate School financial activity and performance with a set of financial and investment policies designed to:* Protect the assets of the organization
* Ensure the maintenance of accurate records of the organization’s financial activities
* Provide a framework for the organization’s financial decision making
* Establish operating standards and behavioral expectations
* Ensure compliance with federal, state, and local legal and reporting requirements.

**Membership** 1. The Board will appoint members of the Committee at the recommendation of the Chair of the Board, each to serve for two-year terms.
2. The Treasurer will be a permanent member of the Finance Committee and serve as it’s Chair.
3. The Board may fill vacancies on the Committee. The Board may remove a Committee member from the Committee at any time, with or without cause.

**Operations** 1. The Committee will meet with such frequency as it may determine. The Chair of the Committee will preside over Committee meetings. A majority of Committee members will constitute a quorum. Committee approvals will require a vote of a simple majority of the Committee members present at a meeting at which a quorum is present. Remote attendance and electronic voting are acceptable.
2. The Committee will report its activities to the Board on a regular basis and will keep minutes of its meetings.
3. The Committee may invite any director, officer, employee, outside advisor or other individual who is not a Committee member to attend Committee meetings or meet with Committee members, but such persons will not have voting power and will not be held out as Committee members.
4. The chief financial officer will serve as the Committee’s staff liaison.
5. The Committee will review this charter periodically and recommend any proposed changes to the Governance Committee for review and presentation to the Board for approval.

**Responsibilities** 1. Review and make recommendations to the Board regarding the institution’s budget, including the process used in developing the budget.
2. Review periodically operating cash flows, liquidity position, and operating (revenue and expense) performance against budget and projections.
3. Lead Board review of institution’s plans to ensure long-term financial sustainability.
4. Review regularly developments in relevant state and federal funding programs and requirements and the institution’s compliance with such requirements.
5. Review and make recommendations to the Board regarding the establishment and termination of banking and similar relationships.
6. Review the institution’s investments, including investment objectives, strategy, reporting, and performance, and monitor execution against Adler’s investment policy.
7. Review the performance and make recommendations to the Board on the retention and, when appropriate, termination of the independent auditor, and negotiate the terms of engagement subject to Board approval.
8. Meet with the auditor and staff to discuss the audit plan, the annual financial statements and the completed audit.
9. Review the audit and determine whether to recommend acceptance of the audit to the Board.

APPENDIX CADLER GRADUATE SCHOOL (AGS)**STRATEGIC INVESTMENT POLICY****Policy Statement**AGS’ strategic investments are comprised of two components. The first being a dedicated and segregated endowment fund. The second is a fund to support AGS’ long-term strategic initiatives other than endowments (e.g. campus expansion). **Endowment Overview** The Endowment is a long-term perpetual asset. Its role is to provide financial support to the benefit of both the current generation and future generations of AGS students. Therefore, the investment program maintains a long-term focus. Good stewardship of this asset is of the highest importance, which is why the Endowment is managed by the AGS Finance Committee. The committee sets investment policy in keeping with AGS’ long-term goals and objectives. The V.P. Finance or chosen external investment professionals is responsible for carrying out investment policy by investing the portfolio in a diversified mix of U.S. based equity and fixed income assets. **Objectives*** **FINANCIAL OBJECTIVE** The principal financial objective of the investment program is to preserve and, if possible, enhance the real purchasing power of the Endowment principal in order to ensure the AGS’ financial future. The Endowment must strike a balance between the preservation of principal in real terms for perpetuity and support of the AGS’ current scholarship needs.
* **INVESTMENT OBJECTIVES** In order to achieve the financial objectives of the investment program, the investment goal of the Endowment is to generate a real return of 4% annualized (net of expenses and inflation) over the long run. The 4% real return goal is expected to allow AGS to grow the principal of the Endowment in order to support future generations’ needs, and to maintain its current spending objective which supports near-term AGS operations. It is understood that the asset allocation of the Endowment will be the primary driver of its performance over time. The Finance Committee sets the asset allocation policy that is expected to achieve the 4% real return investment objective. At least every two years a formal asset allocation review of the Endowment is conducted to ensure that the portfolio is appropriately structured given the financial needs and constraints of AGS. While the Finance Committee sets the asset allocation policy, the V.P. Finance is responsible for the implementation of the policy and the day to day management of the Endowment. If an outside investment manager is used, the firm will be evaluated based on the actual Endowment performance relative to the asset allocation policy benchmark. Over the long term, focusing on three to five year periods, the expectation is to meet or exceed the asset allocation policy benchmark and therefore exceed the real return objective.
* **SPENDING OBJECTIVE** Starting in fiscal year 2020 the Endowment will transfer to AGS’ Operating Fund annually 3% of the four quarters moving average market value of the Endowment. The transfer will result in a minimum increase of 0% and a maximum increase of 10% over the prior year’s payout.

***Target Asset Allocation***Equity 70% Fixed Income 27% Cash 3% **Strategic Initiatives Overview** The strategic initiatives fund is a medium term (3-5 years) asset. Its role is to provide financial funding for key AGS strategic initiatives (e.g. campus expansion, major program development, expansion of on-line capabilities etc.). The Finance Committee sets the asset allocation policy that is has primary objective of capital preservation and liquidity. Given the intermediate time period, the asset allocation is skewed toward fixed income investments, but with a modest equity allocation to enhance the return of the portfolio.***Target Asset Allocation***Equity 25% Fixed Income 75% Cash 0%APPENDIX D**ADLER GRADUATE SCHOOL****Income Statement****7/1/2018-10/31/2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   |   | **Actual** | **Budget** | **Full-Year Budget** |
|   |   |  |  | **7/1/18-6/30/19** |
| Revenues Gains and Other Support |   |  |  |  |
|  |   |   |   |   |
|  Tuition and Fees | Total | 1,926,033 | 1,812,318 | 3,833,290 |
|  Less: Scholarships and Grants | Total Less: Scholarships and Grants | -6,098 |  -  |  -  |
| Contributions | Total Contributions | 279 | 8,204 | 10,000 |
|  Rental Income | Total | 4,265 | 6,000 | 6,000 |
|  Interest Income | Total Interest Income | 9,817 | 13,819 | 60,000 |
|  Other Income | Total Other Income | 22,966 | 12,989 | 48,000 |
|   | Total Revenues Gains and Other Support | 1,957,262 | 1,853,330 | 3,957,290 |
| Expenses |   |   |   |   |
| Salaries and Benefits |   |   |   |   |
| Salaries and Wages |   |   |   |   |
|   | Salaries and Wages-Administration | 405,551 | 387,522 | 1,162,758 |
|   | Salaries and Wages-Academic | 589,186 | 512,036 | 1,536,102 |
|   | Total Salaries and Wages | 994,737 | 899,558 | 2,698,860 |
|  |  |  |  |  |
|  Payroll Taxes | Total Payroll Taxes | 71,805 | 68,824 | 206,466 |
|  Health and Dental Benefits |  Total Health and Dental Benefits | 71,549 | 92,176 | 276,534 |
|  Life and Disability Benefits |  Total Life and Disability Benefits | 6,833 | 7,204 | 21,681 |
|   | Total Salaries and Benefits | 1,144,924 | 1,067,762 | 3,203,541 |
| Other Operating Expenses |   |   |   |   |
|  Accounting and Legal | Total Accounting and Legal | 26,365 | 15,692 | 30,000 |
|  Advertising |   |   |   |   |
|   | Total Advertising | 12,752 | 11,038 | 40,000 |
| Alumni Association Expense | Total Alumni Association Expenses | 475 |  -  |  -  |
|  Bad Debt |   |   |   |   |
|   | Total Bad Debt | 20,640 | 5,285 | 30,000 |
|  Bank Charges |   |   |   |   |
|   | Total Bank Charges | 1,261 | 1,621 | 5,000 |
|  Contract Fees |   |   |   |   |
|   | Total Contract Fees | 9,175 | 15,514 | 70,000 |
| Credit Card Processing Fees | Total Credit Card Processing Fees | 7,960 | 9,849 | 25,000 |
| Depreciation & Amortization | Total Depreciation and Amortization | 22,721 | 28,328 | 87,000 |
| Dues and Subscriptions | Total Dues and Subscriptions | 13,339 | 24,479 | 40,000 |
|  Equipment Rental | Total Equipment Rental | 6,678 | 6,499 | 20,000 |
|  Food and Beverage | Total Food and Beverage | 3,280 | 6,120 | 24,094 |
|  Information Technology | Total Information Technology | 12,876 | 17,418 | 50,000 |
|  Insurance | Total Insurance | 12,875 | 25,555 | 65,000 |
|  Library | Total Library Expense | 19,347 | 30,018 | 60,000 |
|  Materials and Supplies | Total Materials and Supplies | 20,814 | 17,495 | 60,000 |
|  Miscellaneous Expense | Total Miscellaneous Expense | 39 | 125 | 500 |
| Workshop Expense | Total Workshop Expense | 6,741 |  -  |  -  |
| Payroll Processing Fees | Total Payroll Processing Fees | 4,020 | 966 | 15,000 |
|  Postage and Mailing | Total Postage and Mailing | 1,000 | 1,186 | 3,000 |
|  Printing and Copying | Total Printing and Copying | 4,972 | 4,464 | 20,000 |
| Repairs and Maintenance | Total Repairs and Maintenance | 13,082 |  -  |  -  |
|  Telephone | Total Telephone | 4,510 | 1,259 | 10,000 |
| Travel and Training |  |  |  |  |
|   | Total Travel and Training | 7,840 | 9,086 | 67,000 |
| Interest Expense | Total Interest Expense | 31,480 | 18,524 | 98,500 |
|   | Total Other Operating Expenses | 264,242 | 250,521 | 820,094 |
| Facilities Expense |   |   |   |   |
|   | Total Facilities Expense | 102,285 | 92,342 | 204,800 |
|   | Total Expenses | 1,511,451 | 1,410,625 | 4,228,435 |
|   | **BEGINNING NET ASSETS** | **5,041,758** | **5,041,758** | **5,041,758** |
|   | **NET SURPLUS/(DEFICIT)** | **445,811** | **442,705** | **-271,145** |
|   | **ENDING NET ASSETS** | **5,487,569** | **5,484,463** | **4,770,613** |

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