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Business Plan

Prepared By:

Patrick Barlow, Marie Baehr, Steve Beyerlein, Joann Horton,
Betty Hurd, Chaya Jain, Libby Mahaffey, Mary Moore,
Peter Smith, Ingrid Ulbrich, Matthew Watts

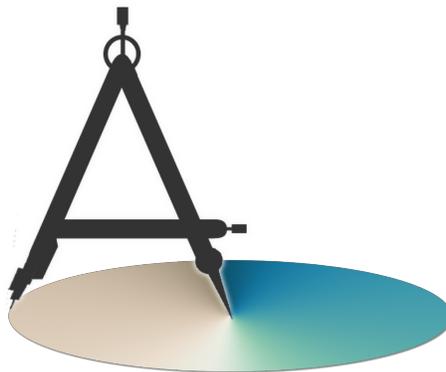
The Academy of Process Educators

10113 W 68th Way, Arvada, CO 80004

info@processeducation.org

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1 Executive Summary

The Academy of Process Educators (AoPE) is a nonprofit organization that offers resources, training and talent to inspire faculty and staff in higher education to foster student success in college and in life by expanding their learning skills, thereby growing their capacity to learn. **Conceived in 2007 and incorporated in 2008 the Academy of Process Educators is a 501(c)3 educational organization.** Academy members/customers include faculty, staff, students, administrators and business partners who are committed to student success and lifelong growth.

AoPE members trust and respect students and are willing to shift control of their learning to them. These educators want to see growth in others and strive to foster their own self-growth. They can handle change and are willing to innovate and experiment. Because assessment is the best way to improve performance, they enjoy it, seek it, and practice it.

Using applied research and student success tools developed by the Academy, our customers will experience a sense of accomplishment and fulfillment as their students grow and thrive. The research and tools offered also enhance program and institutional outcomes. Institutions, faculty, and staff will gain recognition as excellent facilitators of learning. The Academy provides professional development experiences and grant opportunities for its members.

To achieve these outcomes the Academy seeks to forge collaborative partnerships with other organizations focused on student success, faculty and curriculum development, and the pursuit of mutually beneficial grant proposal opportunities.



2 Company & Business Description

Company Purpose

Using applied research and student success tools developed by the Academy, our members/customers will experience a sense of accomplishment, growth, and fulfillment as their students grow and thrive. The research and tools offered also enhance program and institutional outcomes. Institutions, faculty, and staff will gain recognition as excellent facilitators of learning while increasing the focus on student success. The Academy provides professional development experiences, research, and grant opportunities for its members.

Value Proposition

The Academy of Process Educators helps professionals to grow their learning and performance by unlocking their unlimited potential.

Mission/Vision/Values

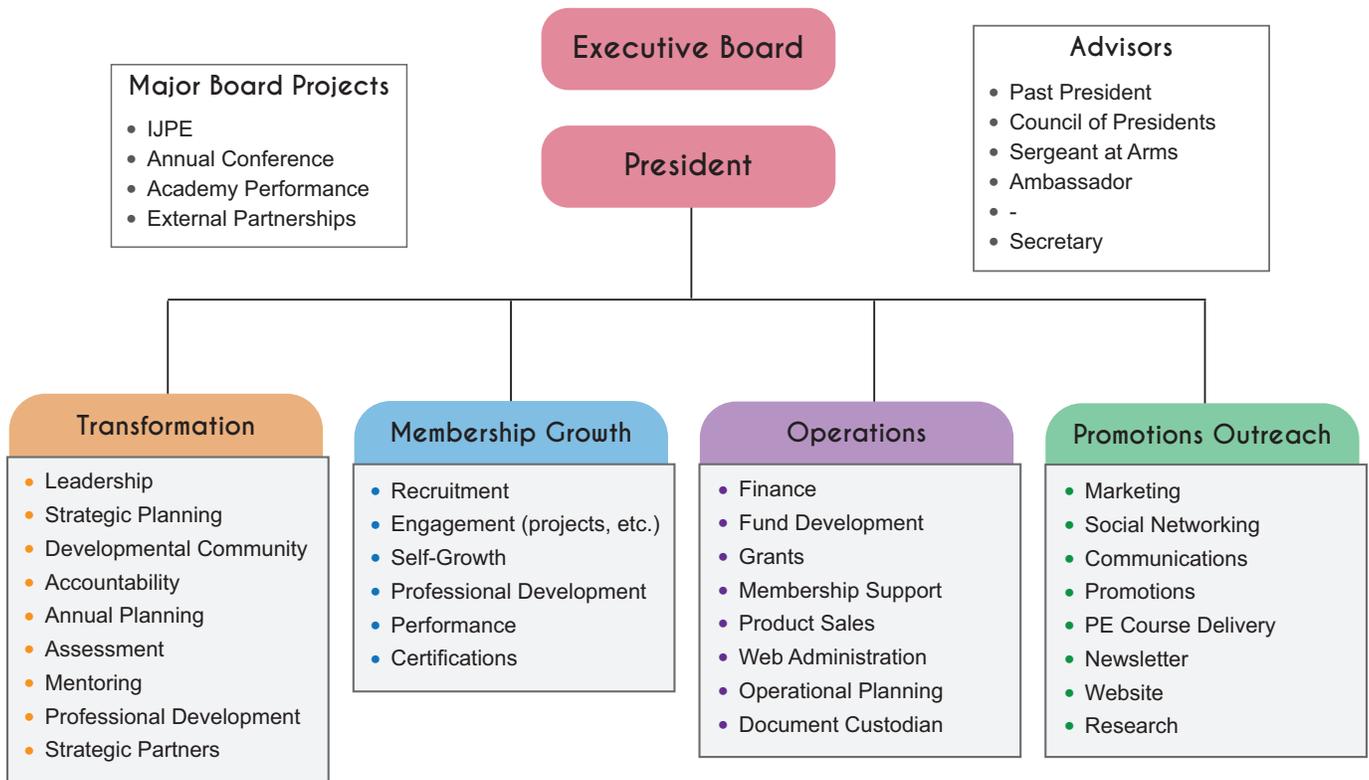
Values

Our organization strives to be ethical, responsible, accountable, and trustworthy, relating with others with integrity, respect, and honesty. Our organizational values are: **growth**, **community**, **diversity**, and **performance**.

- Growth** We believe that everyone has the potential to generate their own self-growth so they work towards becoming their ideal selves and improve the quality of their lives.
- Community** We form a network of like-minded individuals who develop/uphold best practices, provide mentoring, seek continuous improvement, and grow together.
- diversity** We invite, welcome, and celebrate participation of individuals with multiple perspectives brought by their geography, nationality, age, ability, discipline, job function, ethnic/racial background, and gender.

Team & Organizational Structure

Our current membership stands at approximately 250 and includes educators and education professionals around the world (including members on at least 3 different continents). The Academy was established in 2008 and the story of those first 10 years is published in the IJPE article, “25 Years of Process Education”. (*International Journal of Process Education*; article available on request).



Current Board of Directors (2020-21)

We have a strong volunteer board and are justifiably proud of the dedication and passion for Process Education these members show. There are 10 elected board members and 18 appointed members who serve as Directors of Strategic Projects of the Academy.

Elected Board Members

- Joann Horton – President
- Ingrid Ulbrich – President Elect
- Matt Watts – Treasurer/Past President
- Marie Baehr – Secretary
- Elizabeth Mahaffey – Finance Officer
- Wm. Patrick Barlow – Member-at-Large/Conference Chair
- Cynthia Woodbridge - Member-at-Large/Past Secretary
- Betty Hurd - Member-at-Large/Marketing Director
- La Shunda Calvert - Member-at-Large/ Membership Director

Appointed Board Member/Directors (2020-21)

- Peter Smith – Academy Historian
- Chaya Jain – Grants Director



Mary Moore – Assessment Director
Tris Utschig – Professional Development Director
Kimberly Kilgore – Conference Host
Arlene King-Berry - Conference Program - CO-Chair and Sergeant-at-Arms
Wendy Duncan – Deliberately Developmental Organization Director
Al Rowe - Mentoring Director
Wade Ellis – Academy Ambassador
Joyce Adams – Communications Chair
David Leasure – Research Director
Kathy Burke – Editor-in-Chief, International Journal of Process Education
Denna Hintze – Academy Webmaster
Information Director – Steve Spicklemeyer
Project Manager Mentor – Currently Vacant
Membership Chair – La Shunda Calvert



3 Products, Membership Benefits, and Services

The Academy offers a menu of valuable member benefits. The following current Academy products and services are considered the most valuable and tangible for our members.

- The *Faculty Guidebook* (Authored by Academy members; published by Pacific Crest)
- The Annual Conference
- The *International Journal of Process Education* (IJPE)
- The Monthly newsletter
- The Annual Winter meeting
- The Professional Development Series
- The Self-Growth Community experiences
- The Mentoring Opportunities available

We offer our products and services with our members and customers via:

- The Academy monthly member Newsletter
- The Academy websites
- Social media platform access
- Individual and institutional contacts
- Active recruitment of faculty, staff, and administrators

The benefits of membership include:

- Access to the Academy Members-only Website
- Participation in ongoing Academy activities and research
- Online annual conference attendance
- Access to Conference Proceedings
- Invitation to the Self-Growth Community
- Personal access to the electronic Faculty Guidebook
- Access to the International Journal of Process Education
- Scholarship coaching
- Opportunities to build professional relationships
- A 35% registration discount for any Pacific Crest event

Pricing Model

Membership in the Academy runs from October 1 to September 30 annually. Our current membership stands at 250 individuals. Membership Development goals are being established including: seeking a 25% increase in Conference participation from 44 to 55 for 2021. The Academy seeks to increase



the overall diversity of membership, and increase the number of Institutional memberships in the Academy.

Annual individual membership fees are \$70 (\$35 for students). The Academy also offers Institutional membership for up to 50 faculty, staff, and administrators to become members. The cost for this Institutional membership is \$375 per year. **The Academy of Process Educators is a 501(c)3 educational organization. A portion of member dues may be tax deductible.** For new members, \$50 is tax-deductible. For renewing members, all \$70 is tax-deductible.



4 Market Analysis

Our Target Market

Stakeholders at institutions of higher education and business-related educational professionals.

Buyer Personas (Individuals Who Are Likely To Join The Academy)

Faculty, staff, students, administrators and business partners at universities, colleges, and community colleges who are interested in need of professional development to support student success and growth.

Location Analysis

The Academy includes International members and offers experiences virtually and on site at colleges and universities across North America.

Competitor Analysis

Competitor Name	Competitor A: Team-Based Learning Community <i>A structured form of small-group learning that emphasizes student preparation out of class and application of knowledge in class.</i>
Comparative Strength(s)	Good focus on social dimension of learning and on readiness assessment; Offers two levels of certification for members (model for us to consider)
Comparative Weakness(es)	Does not appreciate the richness of methodologies and growth of learning skills as much as the PE community
Counterpoint(s)	We have a good conduit for inside information via Will Ofstad who has been involved in TBL leadership over the years

Competitor Name	Competitor B: Process Oriented Guided Inquiry Learning Community <i>A student centered, group learning instructional strategy</i>
Comparative Strength(s)	Uses activity design model similar to PE; has marketed process oriented textbooks which have been widely adopted
Comparative Weakness(es)	Focus on chemistry & physics; does not appreciate the richness of methodologies and growth of learning skills as much as the PE community
Counterpoint(s)	Numerous PE members have direct experience with POGIL that we can leverage

Competitor Name	Competitor C: On Course – Student Success Model <i>On Course improves student outcomes and experiences.</i>
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Comparative Strength(s)	Strong focus on faculty development via intensive on site workshops, an annual Conference, an interactive Web Site, and a published textbook.
Comparative Weakness(es)	The focus is strongly based on psychology and brain science, while incorporating behavioral and aspirational changes, but a less coordinated Sequence of Methodologies.
Counterpoint(s)	We have members who have been trained in On Course and are working in institutions who have used these principles to create “Student Success courses and support systems.



5 Marketing Plan

Target Contact Demographics

- Focus on ages 30-50
- People in education, business and industry with an interest in growth in themselves and others
- All genders, races, ethnicities
- PhD and Masters educators
- University and Community Colleges

Acquisition Channels

Academy Website

Social Media Sites

- Facebook
- Twitter
- LinkedIn
- Instagram

Partner Institution Resources

National Conference Presentations by Academy Ambassador(s)

International Journal of Process Education

Tools and Technology

Academy Newsletter – monthly

Academy Programming

- Professional Development Series
- Self-Growth Community
- Special Issues Series – i.e. equity and ethnicity Issues

Social Media Sites (this list duplicates the Acquisition channels list)

- Facebook
- Twitter
- LinkedIn
- Instagram



6 Sales Plan

Memberships & Institutional Membership

Enhancing & increasing membership in the organization is our current focus. Targets for 2021-22 include an increase of 25% in membership.

Sales Methodology

- Request current members to renew their membership
- Reach out to institutions and individuals from our targeted audience
- Include membership fees as a part of annual conference fee
- Invoice Institutional Members to renew the annual membership

Sales Organization Structure

The Treasurer and Membership Director collaboratively lead the focus for continued increases in members.

Sales Channels

- The Academy Website, Monthly Member Newsletter, Social Media, and word of mouth.
- The Annual Conference, Professional Development Series, Self-Growth Community, Research Training program, etc.

Tools and Technology

Academy Website, Social Media, Monthly Member Newsletter



7 Legal Notes

The Academy of Process Educators is a 501(c)3 educational organization. Academy members/ customers include faculty, staff, students, administrators and business partners who are committed to student success and lifelong growth. The Academy is governed by a volunteer Board of Directors operating under the following guidelines:

By Laws - On website link

Articles of Incorporation – On website link (<https://www.processeducation.org>)

Legal Considerations

- 990N Annual Report to the IRS
- Tax Exempt Forms
- Conflict of Interest report
- NY State Charitable Report
- Western Surety Company Policy – Bonds for financial officers



8 Financial Considerations

Startup Costs

Lawyer Incorporation Fees	\$867
New York State Charitable Organization registration	\$ 25
Corporate Notebook	\$ 60
501(c)3 Application fee	\$750
Website and Domain Name costs	\$167
Total	\$1,869

Sales Forecasts (See Five Year Budget Review and Projection in Appendix)

Item	2021-22	2022-23	2023-24
Membership Fees	\$ 3,500	\$ 4,000	\$ 4,500
Conference Fees	\$20,000	\$21,000	\$22,000
Donations	\$ 500	\$ 500	\$ 500

Break-Even Analysis

We are a 501(c)3 organization so we budget to break even every year

Projected P&L

As a 501(c)3 organization we are not expected to turn a profit and plan not to suffer a loss.

Current Funding Requirements

We need a \$500 donation, 50 attendees at our June online summer conference or else 35 attendees and 3 institutional memberships, for a total income of \$6,500.

We are seeking Grant funding to accomplish growth goals and establish additional partnerships with Colleges and Institutions dedicated to continued improvement in student outcomes.

