

# **APTA** 2021 BUDGET

62-05 **ACTIVITY NUMBER:** 

ACTIVITY:	APTA Fellowship in Education Leadership
TYPE:	Program

BUDGET LEAD:	Bill Boissonault
BUDGET STAFF:	Anne Reicherter

TOTAL REVENUE:	\$ 126,000
TOTAL EXPENSES:	\$ 209,990
NET REVENUE:	\$ (83,990

#### BRIEF ACTIVITY DESCRIPTION (DETAILED DESCRIPTION FOUND IN WORK PLAN)

The APTA Fellowship in Education Leadership is a year-long program disigned to develop leaders within the profession's education community.

#### EXPENSES

Detail the expenses needed for this activity.

	CI C	I HOS	
Expense	GL Code	_	mount
Salaries	600	\$	87,570
Benefits	602	\$	25,900
Payroll taxes	603	\$	6,100
Recruitment	604		
Temporary employ.	605	-	
Equipment leasing	606	ļ	
Publish contract	607	ļ	-
Depreciation	610	ļ	
Copying	611	ļ	20
Maintenance/repair	612		
Occupancy	613		5,470
Supplies	614		30
Telephone/fax	615		
Postage/shipping	616		800
Small office furn.	617	L	-
Printing - general	620		50
Printing - resale	621	İ.	
Printing - Journal	622		
Printing · APTA Mag	623		
Advertising	624		600
Audiovisual	625		500
Data processing	626		1,000
Staff training/CE	629		
Travel - staff	630		1,830
Travel · member	631		13,620
Travel - nonmember	632	1	
Teleconferencing	634		
Meeting services	635		28,500
Honoraria	636		36,500
Exhibits fees	638	Ī	1,500
Legal fees	639		•
Prof. charges	640	Ī	
Awards/grants	641	T	
Commissions	643	T	
Do Not Use	645	1	
Dues	650	1	
Subscriptions	651	Ť	•
Insurance	652	1	
Misc. donations	660		
Doubtful accounts	695	-	-
Taxes	696	1	
Distrib. to sections	697	1	
Bank fees	698	-	
Miscellaneous	699	1	
Total expenses		\$	209,990
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#### REVENUE

Detail the revenue this activity earns, if any.

Revenue	GL Code	Amount
Dues income	420	\$ -
Interest income	421	-
Contract income	424	
Accreditation fees	435	
Examination fees	436	-
Commissions	437	-
Staff services	438	
Sponsorships	440	-
Miscellaneous	444	
Registration fees	451	126,000
Exhibit booth fees	452	
Special events	453	-
Do Not Use	454	-
Subs - PT Partners	464	
Subs - APTA Mag NM	465	
Subs - PTJ NM	466	
Subs · Hooked	467	-
Subs - Other	469	
Subs - APTA Mag Mem	488	-
Subs - PTJ Mem	491	-
Ads - Display	502	
Ads - Classified	503	-
Ads - Agency Comm	504	-
Ads - Program	505	
Sale of mailing labels	516	-
Royalties - other	517	-
Sale of reprints	525	
Sale of printed materials	526	
Sale of promo items	527	
Total revenue		\$ 126,000

### SUMMARY AND PERCENTAGES

Information calculated based on numbers to the left.

Percentage of Staffing Expenses				
Salary	\$	87,570	41.70%	
Benefits and payroll taxes		32,000	15.24%	
Other personnel expenses		• 1	0.00%	
Total	\$	119,570	56.94%	

\$	90,420	43.06%
	600	0.299
_		0.003
	36,500	17.38%
		0.00%
	850	0.40%
	15,450	7.36%
	6,520	3.10%
	30,500	14.52%
\$		0.00%
	\$ \$	\$ . 30,500 6,520 15,450 850 36,500

Note A - Office expenses include depreciation, equipment leasing, copying, maintenance and repairs (of both software and buildings), occupancy, supplies, telephone and teleconferencing, small office furniture, data processing, and insurance.

Note B - Other expenses include publishing contracts, advertising, staff training, commissions, dues, subscriptions, donations, doubtful accounts, and misc.

## OTHER REVENUE AND EXPENSE INFORMATION

Provide any additional information that would be beneficial to the reader of this worksheet.

ELI has had access for temporary staff since 2017, and that 1.0 FTE was split between ACA/62-02 and ELI/62-05. At a minimum, since only 1 staff member is assigned to both ACA and APTA Fellowship in Educational Leadership, that at least a .25 FTE be allowed from temp staff, assuming there can be other staff assistance from within the association. Revenue projections are based on 18 fellows. As the number of fellows admitted increases, so will revenue at \$7,000 per fellow up to 24 fellows. For the three on-site meetings, two (Sessions I and III) will be held at headquarters to reduce expenses. For Session II, we will continue with Albequerque, as that is a low-cost time of year for that location (March).

# STAFFING NEEDED

Detail the staffing needed to achieve this activity.

lame (last, first), listed alphabetically	Hours
deicherter, Anne	975
Johnson, Agatha	390
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Total staff hours	1,365

### STRATEGIC PLAN CONNECTION

If linked, please put an "x" in the box.

Strategic Plan Objective	Linked?
Increase Member Value and Engagement	
Obj 1 - Tools and research for practice	
Obj 2 - Value propositions	
Foster the Long-Term Sustainability of the	Profession
Obj 3 · Early career issues	x
Obj 4 - Diversity, equity and inclusion	
Elevate the Quality of Care Provided by PT	s/PTAs
Obj 5 - Outcomes Registry	
Obj 6 · Access expansion	
Maximize Stakeholder Awareness of the Va	lue
Obj 7 - Payment policies	
Obj 8 - Brand	
Obj 9 - Public awareness	
Outcomes:	
- Increased participation in the Outcomes	Registry
- Higher retention rates among targeted s	egments
- Higher levels of volunteer engagement	
- Evidence of increased awareness of PT	
- Changes to PT education pathways	
- Evidence of APTA's efforts to create a m	ore diverse
and inclusive profession and association	1

## SUB-ACTIVITY LISTING (IF NEEDED)

If using sub-activities, please list them below

Sub-activity	Code
·	001
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# PRIOR YEAR FINANCIAL INFORMATION (NOT APPLICABLE FOR NEW ACTIVITIES)

Provide prior year (PY) budget and forecast information for revenue, staffing expenses and direct expenses.

	Bu	dgeted	Budgeted		Forecast	
Revenue	\$	126,000	\$	136,500	\$	126,000
Expenses:	1					
Staffing		119,570		77,030		77,032
Direct	1	90,420		98,560		55,701
Total Exp	i	209,990		175,590		132,733
Net Revenue	3	(83,990)		(39,090)		(6,733)

2021 2020 2020

\$	Change	% Change	\$ Change	% Change	
C	CY Budget to PY Budget		CY Budget to PY Forecas		
_					
\$	(10,500)	-7.69%	\$ -	0.00%	
	42,540	55.23%	42,538	55.22%	
	(8,140)	-8.26%	34,719	62.33%	
44 80-40.384	34,400	19.59%	77,257	58.20%	
	(44,900)	0.00%	(77,257)	0.00%	

FUTURE IMPLICATIONS,	NOTES AND	OTHER BUDGET	INFORMATION
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