



## **2012 Annual Report**

**At Career Transition Institute, our mission is to educate members about the professional skills and strategies for a successful job search, career change, or career advancement in today's job market.**

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## A Message From Our Chairperson



The monthly jobs report comes out with great anticipation and in June of 2013, we learn the Federal Reserve has tied its monetary policies to the unemployment rate. If you look at just the reported unemployment rates, you conclude that everything is getting better specifically the economy is getting better, but what does that mean if you are unemployed? The government can continue to report reduced unemployment numbers, but if you have not landed in that new job, then you are still 100% unemployed.

Career Transition Institute has been serving the needs of job seekers for over 30 years. Known since its founding as Forty Plus of Central Ohio, the decision was made in 2012 to change the name to better demonstrate our brand. There was a day when members came to Forty Plus for training, learning new transition skills, and for community support, but very importantly an edge in technology. Access to a fax machine to receive that application or send a résumé...we were high tech, cutting edge. At that time, there were no laser printers at home and maybe not even a computer to write your résumé.

Today you will still find the fax machine, but it is part of a multi-function printer and scanner, you will find the phone rooms for interviewing and the computer workstations with Internet access (of course we have Wi-Fi), but the success of the organization is still that we are the premier training organization in central Ohio teaching the skills you need for a successful career transition.

As you will see in the following pages, we help our members develop these skills in a number of ways, including:

- **Training** - an established curriculum that is at the core of what we do
- **Support & Community** - allowing our members to interact with like-minded people who are in the same situation they are
- **Mentoring** - providing additional guidance and coaching through a challenging time, based on the needs and desires of the member
- **Networking** - offering the opportunity to build a more robust professional network and further develop those all-important networking skills
- **Community Leadership** - promoting volunteer service that brings needed skills to citizens and fuller employment in the community we serve.

Thank you for your interest in Career Transition Institute and enjoy the Annual Report!

James Bishop – Chairman

Let's connect - <http://www.linkedin.com/in/jimbishop>

## Description of the Business

Career Transition Institute is a member and volunteer-operated 501(c)(3) nonprofit organization that offers job search training at nominal cost to professional job seekers of all ages. Founded under the name Forty Plus of Central Ohio in 1982, Career Transition Institute has helped thousands of members manage their job searches and careers, and to find jobs. We changed our name in 2013 to better reflect our mission.

Career Transition Institute is the only comprehensive job search training program in Central Ohio with dedicated office space for classes, workshops and regular interaction with fellow members. Offices are located in the lower level of the Reitter Stucco building at 1100 King Avenue in Columbus. We offer a core eight-week program covering the full spectrum of today's job search process, from *Organizing Your Job Search* to *Effective Salary Negotiation* (17 classes). Additional workshops and guest speakers provide guidance on various supplemental topics, including the use of social media, career resources, LinkedIn and personal development. Most classes and workshops are held in our offices during business hours (9 a.m. to 5 p.m. weekdays).



Funding for Career Transition Institute comes from a combination of member dues, donations and honoraria from alumni, other third-party donations, and sponsorships. We also receive nominal income from non-member workshop fees.

Virtually all of our income is used to provide programs to our members. Programming costs include rent, insurance, copying, printing and supplies, and other overhead expenses. The organization is managed entirely by member volunteers and overseen by a board of trustees. None of our income goes toward staff compensation.

Career Transition Institute has received grant funding in the past and submits grant requests to selected organizations from time to time, to assist with the purchase of computers and other office equipment, or to supplement other sources of funds for ongoing operations.

## Organization

Career Transition Institute's members manage day-to-day operations on a volunteer basis, lead by an executive team consisting of a President, Vice President, Treasurer, Secretary, and various committee chairs. A Board of Trustees, which meets monthly and maintains regular contact with the member officers, provides oversight for key decisions and strategic direction.

Members meet weekly to conduct business and vote on important issues, and member officers report regularly to the Board of Trustees. Member committees are Executive, Administration, Computer, Marketing, Membership, Programs, and Training. Member officers are elected by the membership for three-month terms, and committee chairs are appointed by the member president.

In addition to the Board of Trustees, currently consisting of six members, an advisory board provides additional insight and guidance. Advisory board members are typically former members of Career Transition Institute with extensive institutional knowledge and deep subject matter expertise.

## Facilities



The Career Transition Institute training center and offices are located at 1100 King Avenue in Columbus, Ohio. Space is leased from Reitter Stucco Company, and the current three-year lease was signed in July, 2012. The 2,500 square foot space consists of a main classroom accommodating up to 75 people, a secondary classroom with space for 10, six computer workstations, secure wi-fi, print facilities, conference rooms, private cubicles for telephone interviews or confidential conversations, and a reception area.

Offices are open from 9:00 a.m. to 5:00 p.m. Monday through Friday. Training materials are stored electronically and in hard copy form. We also offer a library of business and reference books for member use.

By maintaining a dedicated, stand-alone facility for our members, Career Transition Institute is able to offer a full schedule of classes, workshops and training sessions, meeting and networking facilities, and office space and file storage. These amenities provide our members with a robust job search and career training experience, and enable them to interact with fellow members on a regular basis.

## Services

Career Transition Institute's services center around job search training, individual development, and personal support.

### Training Curriculum

The core of our training curriculum is an eight-week program divided into four separate blocks, as follows:

- Block I: Learn the job search process and how to sell your product - You! (seven classes)
- Block II: Identify and develop your job search strategy (one class)
- Block III: Utilize your strategy to competitively market yourself (four classes)
- Block IV: Practical workshops to enhance and refine your skills (five classes, which are also open to the public for a fee).

All classes are held at the Career Transition Institute training center during normal business hours (9 a.m. to 5 p.m. weekdays).

### Guest Speakers and Speaker Forums

Each Monday morning, Career Transition Institute hosts a guest speaker, who presents on a relevant topic and answers questions from attendees. These regular sessions are free and open to the public. Presentations typically last for one hour and cover a wide range of topics related to job search, career transition, personal development, leadership and financial management, and typically last for one hour.

In addition to the weekly speakers, Career Transition Institute will periodically organize and host speaker forums to bring together subject matter experts in a selected field. These events are open to the public for a nominal fee, and typically run for half a day.



## Networking Opportunities

Every Monday meeting at Career Transition Institute includes a networking component, enabling members and guests to meet one another, share leads and tips, and practice their personal 30-second introductions. On Tuesday evenings, there is an Open Networking Lab in the office hosted by a member and free to the public, offering an opportunity to network in a less formal environment. We are also a member of the Columbus and Grandview Chambers of Commerce, which offer access to additional networking opportunities.



Finally, Career Transition Institute is a member and active participant in the Networking Leaders Alliance, a group that brings together various networking organizations in the Central Ohio area. This affiliation provides members with several opportunities each year to learn about other networking organizations in the area, and to gain exposure to a larger audience of prospective employers and referrals.

## Leadership Experience

Membership at Career Transition Institute comes with a commitment to serve the organization with volunteer time. This service is essential to the organization and enables us to operate without paid staff, while allowing our members to engage in meaningful work while in transition. All members are eligible for leadership positions, including as an officer of the organization or as chair of a committee. These leadership opportunities allow members to gain/retain valuable expertise while also enhancing their résumés.

# Community Partners

Career Transition Institute receives support, financial and otherwise, from a number of valued sponsors and friends in the Central Ohio community:

## **Sponsors of Career Transition Institute**

- Morgan Stanley
- Networking Leaders Alliance
- Ameriprise Financial
- Central Ohio Program Management Institute
- OCLC
- MyHealthQuoter.com
- Center for Solution in Brief Therapy, Inc.

## **Friends of Career Transition Institute**

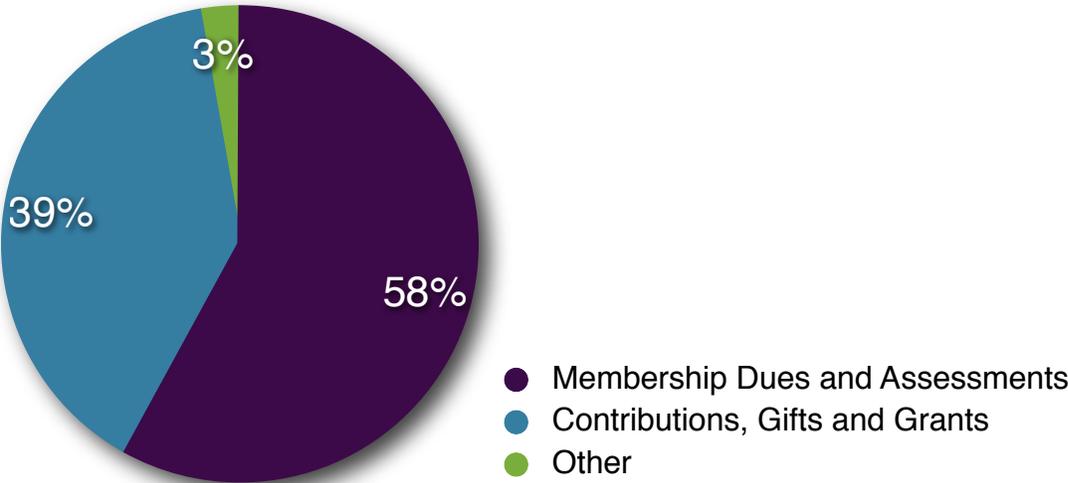
- Bryan Sirak of Local Internet Leads
- Central Ohio Professional Education Council (COPEC)
- Columbus Chamber of Commerce
- Employment for Seniors
- Grandview Chamber of Commerce
- Grandview Public Library
- Human Resources Association of Central Ohio (HRACO)
- Jewish Family Services
- Coach Kevin Tucker
- Reitter Stucco and Supply Company
- Scioto Ridge Job Networking Group
- The Ohio Referral Network (TORN)
- Upper Arlington Public Library

Sponsorship opportunities are available for local companies that see a mutual benefit to affiliating with Career Transition Institute. We place tremendous value on the relationships we have with our sponsors and friends, and are thankful for the benefits they bring to our organization.

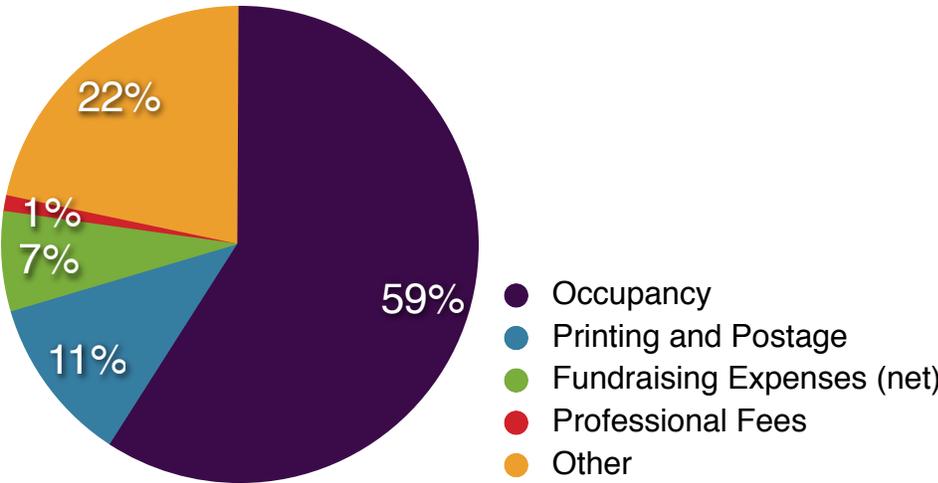
# Sources and Uses of Funds

The charts below provide a breakdown of the sources and uses of funds for Career Transition Institute in 2012.

## Sources of Funds



## Uses of Funds



## Summary of Key Metrics

Key operating metrics for Career Transition Institute are as follows:

	2012	2011	2010
Average Members	15.8	21.3	32.9
New Members	26	30	63
Members Placed	18	15	21
Training Classes Completed	238	230	285
Training Hours Completed	1,170	1,278	2,359
Volunteer Hours	4,559	5,876	8,707

## Financial Summary

Below is a summary of financial results for 2010, 2011 and 2012.

	2012	2011	2010
Membership Dues and Assessments	\$11,198	\$12,905	\$24,070
Contributions, Gifts and Grants	7,575	3,843	4,316
Net Income (Loss) From Fundraising	(1,902)	(1,482)	0
Other Revenue	522	795	1,347
<b>Total Revenue</b>	<b>17,393</b>	<b>16,061</b>	<b>29,733</b>
Occupancy, Rent and Utilities	16,570	16,018	14,056
Printing, Publications and Postage	3,163	4,688	3,417
Professional Fees and Payments	600	488	0
Other Expenses	6,103	7,047	12,416
<b>Total Expenses</b>	<b>26,436</b>	<b>28,241</b>	<b>29,889</b>
Excess (Deficit) for the Year	(9,043)	(12,180)	(156)
Net Assets, Beginning of Year	15,248	27,428	27,270
Other Changes in Net Assets	0	0	314
<b>Net Assets, End of Year</b>	<b>\$6,205</b>	<b>\$15,248</b>	<b>\$27,428</b>

## **2012 Overview**

The year 2012 was transformational for the organization, with pressure on membership levels and lack of progress in the fundraising arena. We responded to these challenges in several ways.

In May 2012 we created and implemented a new marketing plan, with updates to our brochure and website, combined with new efforts in email marketing. Through the use of Constant Contact, announcements about our public workshops and events were created and sent on a regular basis to members, alumni, potential members, sponsors/partners, and the news media. With these marketing improvements and increased media coverage, membership levels began to increase in the second half of 2012.

In September 2012, the Board of Trustees discussed adoption of a new name that would be more descriptive of the mission of the organization. After researching and considering several options, votes were held at the Board and member levels, resulting in adoption of the name Career Transition Institute. A re-branding program began immediately, and included creation of a new logo, brochure and website, all overseen by a trustee with professional experience in marketing communications. The marketing coordination, website design, and brochure were all donated at no charge. The new brand Career Transition Institute launched in March, 2013.

On the services front, we implemented a free weekly networking lab on Tuesday evenings and began offering selected workshops to non-members for a fee.

## **2013 Outlook**

The first quarter of 2013 included heightened marketing and networking efforts associated with the name change. We held a successful kickoff event for members, alumni, invited guests, and the general public in March. As a result of the increased marketing and outreach efforts, active membership in May 2013 was double the level it had been in May 2012.

The Programming Committee held a free Symposium in April featuring presentations about topics relevant for professionals in transition. This special event was well-attended. Marketing and community outreach efforts continue, along with the search for additional members for the board of trustees. The grant and fundraising efforts were renewed in May with the addition of a fundraising professional to the Board of Trustees.

With these united efforts in marketing, networking and community outreach, we expect to experience increases in membership, and more effective fundraising efforts, resulting in more service to the community and improved fiscal strength of the organization.

## **Board of Trustees**

### **Jim Bishop, Chairman**

Jim Bishop is a Financial Advisor with The Bishop Ross Group of Morgan Stanley Wealth Management. He also has a background in business development. He is active in various networking groups in Central Ohio.

### **Linda O'Horo, Vice-Chair**

Linda O'Horo is a writer and consultant with a comprehensive background encompassing employee communications, media and community relations, project management, communications strategy and planning and broadcast news. She is currently working freelance for her business, Wordsmith Communications Consulting. A graduate of our program, she has also served on a number of nonprofit boards in the Columbus area.

### **Kevin Fix, Treasurer**

Kevin Fix is a Certified Public Accountant and Managing Principal of Newhaven Capital Advisors, LLC, an independent financial consulting and investment management firm. Kevin is active on several nonprofit boards in the Columbus area, and he has a diverse background in public accounting, financial markets and company financial management.

### **Reggie Cannon, Secretary**

Reggie Cannon is currently a track and fitness coach and employee for a local school system. He has a background as a supervisor in finance. A former active member, he has served in various roles in our organization.

### **Teresa Trost, Trustee**

Teresa Trost is Executive Director of Community Shares of Mid Ohio, and has a strong background in nonprofit organization management. She is a graduate of our program.

### **Chuck Wolfe, Trustee**

Chuck Wolfe has an executive management career leading medium-scale to large-scale nonprofit organizations worldwide. Chuck is also a graduate of our program.

## **Advisory Board**

### **Steve Bennison**

Steve Bennison retired a few years ago, after a career of 35 years in Human Resources. Most of his experience has been in the manufacturing, technical and distribution industries, starting as an HR generalist and retiring as VP of Administration. The position and firm he retired from was identified through networking while an active member of our organization. He currently facilitates three of our classes and acts as a mentor for current members.

### **Cynthia Hutson**

Cynthia Hutson is Communications Director for Fire & Ice Heating and Air Conditioning, Inc., and works closely with Trane and Lowe's. She is on the executive board of ACCA (Air Conditioner Contractors of America), and co-op chairman for "Heat the Town" (ACCA). "Success through belief in people, products and ideas" has been a mainstay throughout her career.

### **Steve Stetz**

Steve Stetz is a sales and marketing professional. He is a graduate of our program, and a former member of the Board of Trustees.





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