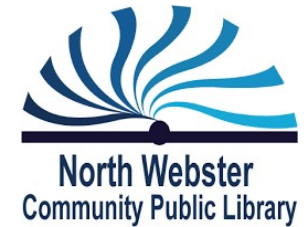




AccountAbility Kosciusko

Lukas Rife - OrthoWorx

Stakeholder Interviews



Background, Problem Defined



Key Takeaways From
Meetings



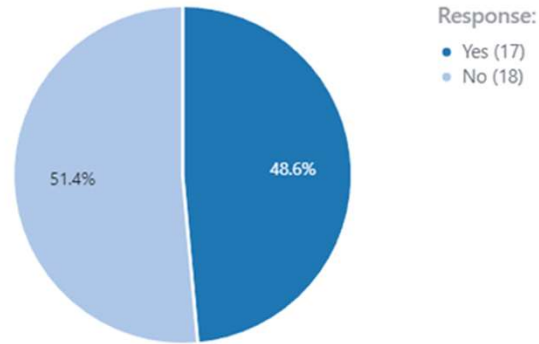
Advisory Board Formed



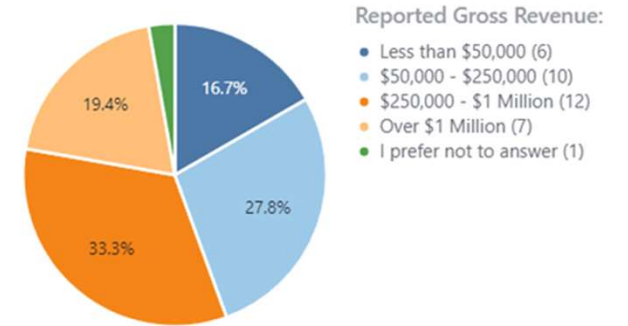
Financial Services
Interest Survey

Survey Results Summary

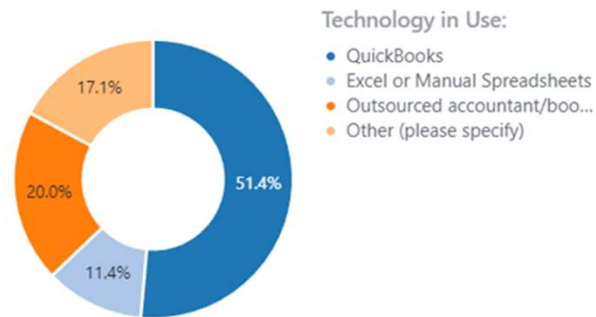
Would you benefit from a financial consultation?



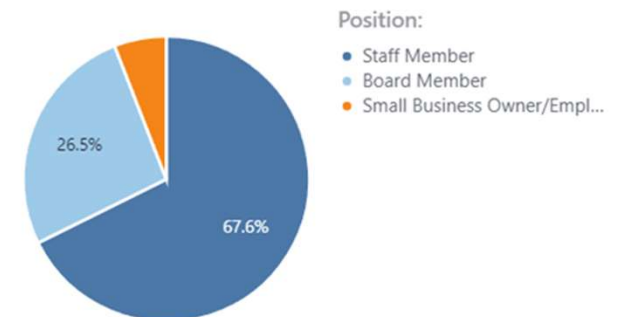
Revenue of Respondents:



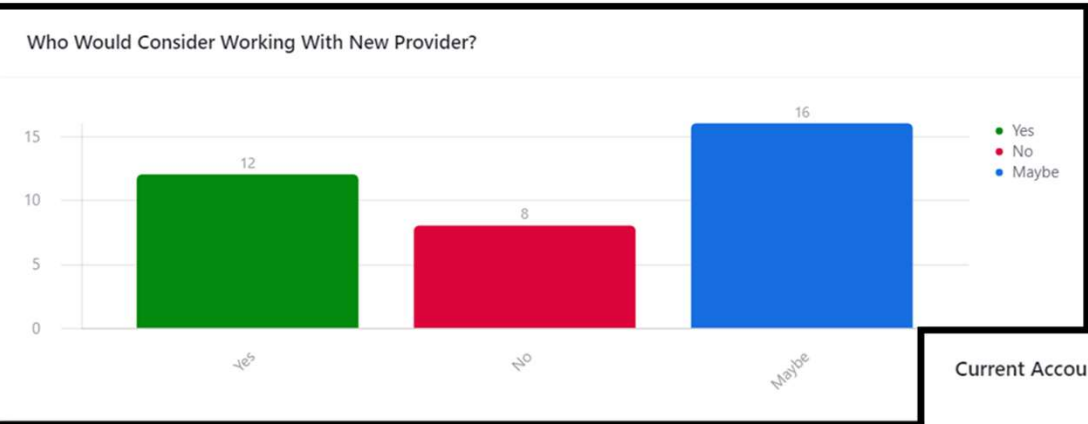
What Technology is Being Used?



Respondents Summary:



Survey Results Summary (Continued)



Current Accounting Solution Ratings (Rows) - Interested in New Provider? (Columns):

| | Yes | No | Maybe | Total |
|--------------|-----------|----------|-----------|-----------|
| (Empty) | 1 | 0 | 0 | 1 |
| ★ | 1 | 0 | 0 | 1 |
| ★★ | 1 | 0 | 1 | 2 |
| ★★★ | 2 | 0 | 4 | 6 |
| ★★★★ | 4 | 0 | 7 | 11 |
| ★★★★★ | 3 | 8 | 4 | 15 |
| Total | 12 | 8 | 16 | 36 |

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Proposed Legal Structure – Student Clinic Model

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Proposed Clinic Structure

1. Hire students
2. Detailed training in the following areas
 - Bookkeeping
 - Payroll
 - Financial Reporting
 - Policy Creation
 - Budgeting and Forecasting
 - Grant Reporting
 - Audit Management and Tax Management
3. Assign students to certain clients
4. Determine student roles for each client
5. Provide an engaging internship evaluation process for each student.

Proposed Pricing and Funding Sources



Will be different pricing depending on the client.



Strong desire for partnerships with local organizations/accounting firms.

Example Clients

- **Client A:** pays \$300 a month or roughly \$30/hour for 10 hours a month for their part-time bookkeeper to provide for their basic accounting needs.
- **Client B:** larger organization, has two staff positions dedicated to their in-house accounting operation, an outsourced accountant, and over 20 total employees
- **Client C:** much smaller organization, has never paid for any accounting services.
- **This work could be completed in our proposed structure by one student.**



Next Steps

Proposal to local colleges/universities

If accepted, work to obtain partnerships and funding for clinic

Refine clinic and pricing structure to prepare for potential pilot in January of 2027

Select most qualified students to participate in clinic/pilot

Select first 2-3 organizations for the initial pilot – currently **9 organizations have expressed interest** in participating.

Northern Award



If selected – we would utilize the funds to be spent exclusively on the first cohort of student’s wages participating in the clinic.



We believe this reflects the heart of KLA to “invest in the emerging leaders of our community”.

Mission Statement, Values

Proposed Mission Statement

Our mission is to empower small businesses, not-for-profit organizations, and others in our community by providing reliable, personalized accounting services. We are committed to fostering financial clarity and sustainability while investing in the education and development of the next generation of accounting professionals locally.

Proposed Core Values

- **Integrity**
- **Community Commitment**
- **Education & Mentorship**
- **Excellence**
- **Collaboration**

Citations

- University of Notre Dame Law School. (n.d.). *Clinical programs & experiential learning*. <https://law.nd.edu/academics/experiential-courses/clinics/>
- Jitasa Group. (n.d.). Nonprofit bookkeeping & accounting services. <https://www.jitasagroup.com/nonprofit-solutions/nonprofit-bookkeeping-accounting-services/>



Questions?

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