



**ACCOUNTING
WITH
INTEGRITY.
SERVING OUR
COMMUNITY.
PREPARING
THE NEXT
GENERATION.**

**KLA
PROJECT
PROUD -
04/14/2026**

KLA WHITEPAPER PROJECT

ACCOUNTABILITY KOSCIUSKO

PROJECT LEAD: LUKAS RIFE

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EXECUTIVE SUMMARY

The desire of this KLA Whitepaper project is to promote a new standard of care for local, small not-for-profit organizations and businesses when it comes to their accounting and financial oversight needs. We hope to do so by kickstarting a clinic focused on enabling local college and high-school students to serve these organizations' needs with a high degree of proficiency and excellence. When we had a chance to meet on this topic, one representative from a local not-for-profit said it best: **"Accountability to community is what drives us to be open, able, and comfortable with sharing our finances."**

Proposed Mission Statement: Our mission is to empower small businesses, not-for-profit organizations, students, and board members in our community by providing reliable, personalized accounting services. We are committed to fostering financial clarity and sustainability while investing in the next generation of accounting professionals through opportunity and guidance.

Proposed Vision Statement: We aim to be a trusted partner for small businesses and not-for-profit organizations in our community, creating a future where financial confidence and transparency empower growth. We envision a thriving local economy supported by ethical accounting practices and a new generation of skilled professionals inspired and educated to lead with integrity.

Proposed Core Values:

- **Integrity** - We uphold the highest ethical standards in every interaction, ensuring transparency and trust.
- **Community Commitment** - Dedicated to strengthening our local community through personalized, reliable services.
- **Education & Mentorship** - Investing in the next generation of accounting professionals through guidance and opportunity.
- **Excellence** - Striving for accuracy, professionalism, and continuous improvement in all we do.
- **Collaboration** - Building strong partnerships with clients and future professionals to achieve shared success.

BACKGROUND

As someone who grew up in a family where both of my parents worked for a not-for-profit organization for 22 years, I believe I have a God-given desire to be involved with mission-based organizations that seek to take the little they have to make a difference whether that is in one person's life, a specific community, or even in the world as a whole. I graduated from Grace College in 2021 with a bachelor's degree in accounting and a master's in business administration. This led me into a career as an auditor in Fort Wayne at a firm - Katz, Sapper & Miller (KSM). I spent about four years working as an auditor and interacting with many different industries. I felt the most enjoyment working with the not-for-profit organizations I was assigned to, but this only amounted to a small percentage of my job as an auditor. As a result, I became a member of a board/finance committee and began to contemplate the future of potentially working for a not-for-profit one day. The Lord opened a door for me to transition to OrthoWorx in January of 2025 in a project management/staff accountant role which I am still in today. As a result of this, I was invited by Allyn Decker to participate in KLA this year. When I thought long and hard about what Whitepaper project I wanted to pitch, and based on my experience at OrthoWorx thus far, I came to realize the critical nature of the role of our experienced bookkeeper and myself to ensure we were positioned for growth. As I began asking around to other local not-for-profit organizations, it became clear that this critical role was not as readily available to these organizations. Therefore, I pitched my project and was approved to dive into what it may look like to provide an option for small entities to have their weekly, monthly, and annual accounting needs met locally and affordably. Without further ado, let's jump into the most important part of the background - the voices of the local not-for-profits.

Stakeholder Interviews

Over the course of the past five months, I have had the privilege of meeting with roughly 40 individuals to discuss the initiatives of this project. These individuals ranged from local not-for-profit leaders to experienced business experts, and an advisory board of 5 members that have been very generous to volunteer their time to brainstorm what it would take to make this idea a reality. (When I say "we" throughout this report, I am referring to myself and this board of 5 individuals.) Of all the things I have enjoyed about this project, talking with these people has been the most enjoyable. It has reflected the collaborative spirit of our community and the willingness of people to come together to provide for and support those in need. Listed below are some highlights of these conversations.

- *Not-for-profit organizations want to maximize every dollar, if you can help them save on cost and still provide excellent services, they are interested!*
- *Our local accounting firms currently do not have much capacity to take on new clients, especially smaller not-for-profits or small businesses.*
- *Consistency in accounting services is a key! If we are going to utilize students, we really need to have a model that will promote and reward consistency.*
- *Students enjoy and benefit greatly from hands-on real world work experience! Local not-for-profits love the idea of promoting an educational experience in-house for students through the financial oversight that they need to complete each month.*
- *There currently is not much assistance available locally for organizations just starting out from an accounting perspective, or a legal perspective.*
- *Non-profit organizations that are not growing and adapting are dying.*
- *Board engagement from these not-for-profit organizations is just as important as staff engagement.*

I learned that there was no shortage of things to say surrounding this topic by community leaders. However, the final note I would add is that overall, ***not-for-profit leaders were responding not by questioning this potential initiative, but by asking “When can you start?”***

These conversations are helpful and important, but if that is all the support we had for the project, I do not think we would have much of a business case.

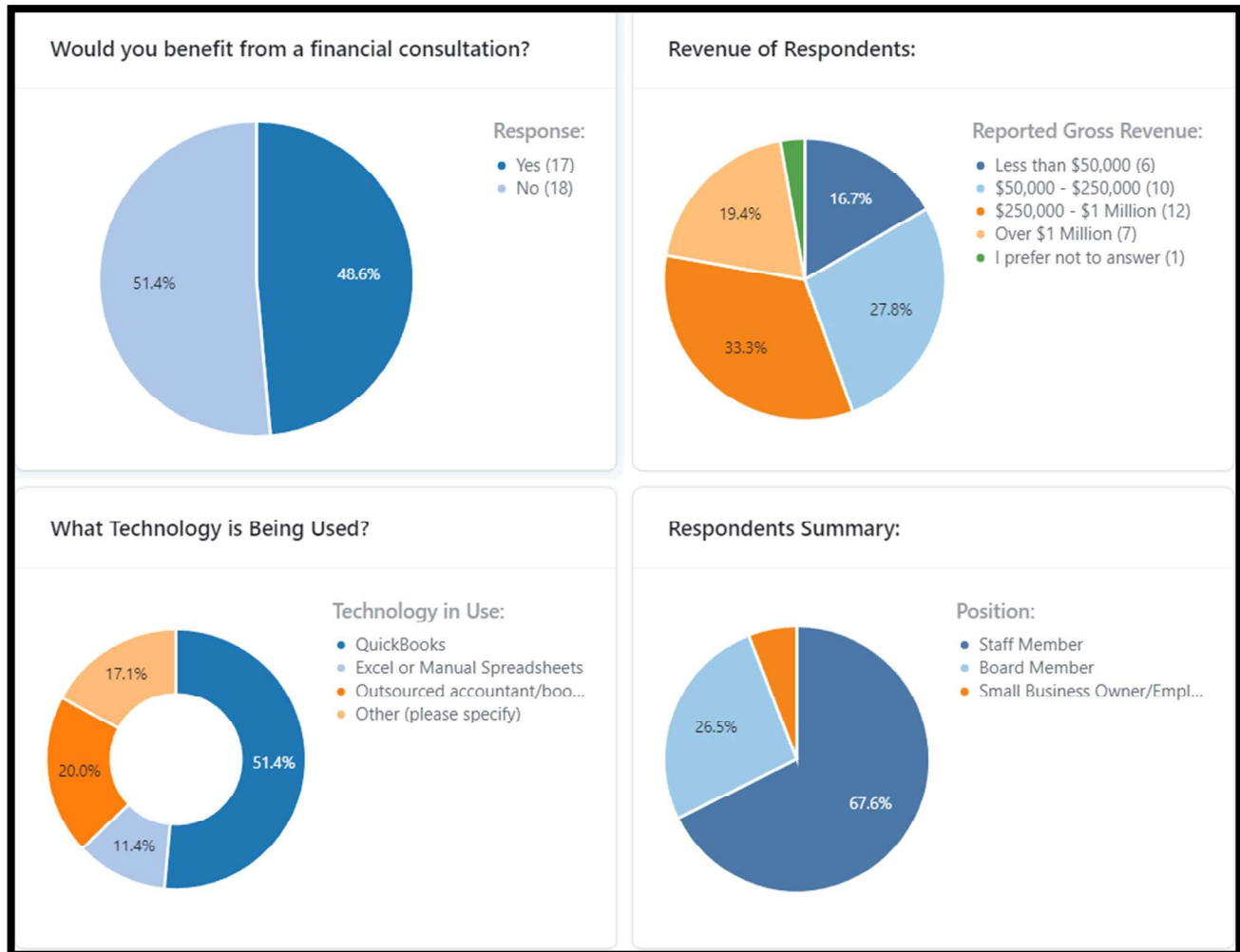
Survey Details and Key Takeaways

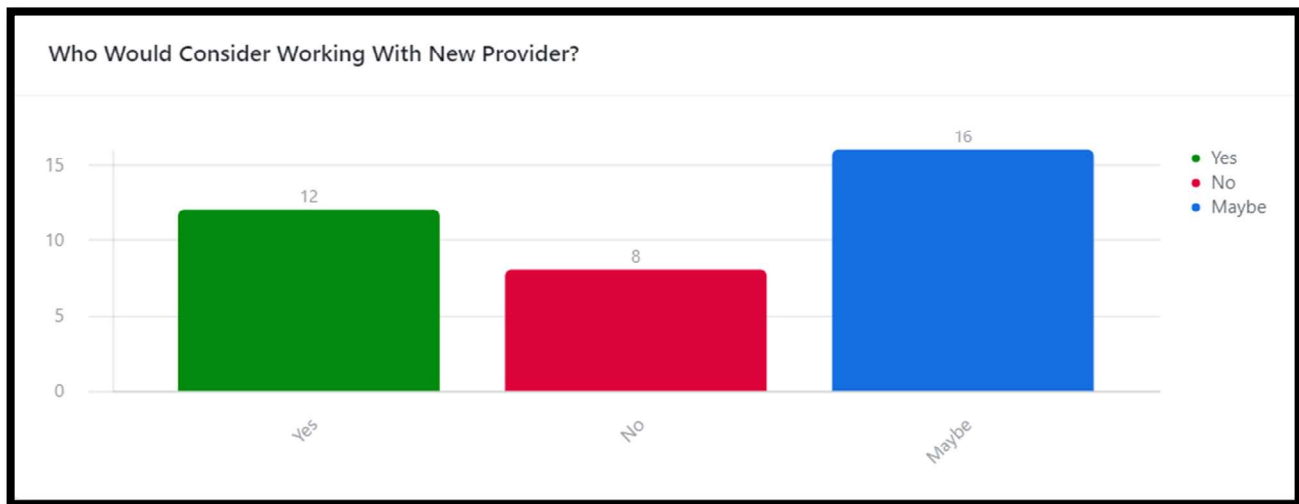
Thankfully, we were able to have 35 unique organizations complete a Financial Services Interest Survey that further tells the story of the meetings we had and serves to cement some of the highlights noted above. The survey was distributed through the help of the Kosciusko County Community Foundation, the Kosciusko Chamber of Commerce and the North Central Indiana Small Business Development Center. The survey was comprised of 22 questions and was intended to gauge the following from each respondent: 1) what their current accounting solution was, 2) what their current solution cost, and 3) if they would be interested in working with a new service provider. Listed below are some of the key questions included in the survey:

- *What accounting or bookkeeping solution does your organization currently use?*

- *How much does your organization currently spend annually on accounting or financial services (if done in-house, how much do you pay accounting employees, and if outsourced what is the cost of those services)?*
- *How satisfied are you with your current accounting solution (5 being completely satisfied and 1 being not satisfied at all)?*
- *Would your organization be interested in receiving financial services from a new organization (e.g., bookkeeping, tax filing, financial reporting) if the services were more affordable?*
- *What would be a reasonable monthly budget for financial services for your organization?*

Observe the visuals below which reflect key results of the survey.





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

The following conclusions can be drawn from the above survey results.

- Almost half of the respondents believe that a financial consultation would be beneficial, and that tells us that there are many organizations that would appreciate more input from their current providers.
- QuickBooks online, which would be our recommended software, is currently being used by about half of the survey respondents. We may need to help some organizations transition to a new software, which can be very challenging.
- This is a service industry and as you can see 21 of the 36 respondents are not completely satisfied with their current providers.
- 28 of the 36 respondents have responded by saying that they would be or may be interested in using a new provider for their accounting needs.

SOLUTION

Proposed Legal Structure

The most difficult aspect of this project plan is the consideration and discussion of how this organization can be legally organized to promote its own sustainability and long-term impact. In researching comparable organizations or organizations that provide non-profit accounting assistance, it became clear that there are not many organizations that have the mission or purpose we are seeking to implement. Instead, what is more common in the broader accounting landscape is **1)** the existence of for-profit accounting firms that serve non-profits exclusively, or **2)** the volunteer efforts of experienced and knowledgeable bookkeepers that have a heart to serve their community with their gifts, or **3)** that people that are not experienced or knowledgeable feel forced to do their small non-profit's or small businesses' accounting themselves, like what we have primarily seen in the results of this survey. This last option, as you might think, is harmful in many respects as it could **1)** lead to burn-out of the current team-members **2)** result in poor accounting procedures and processes **3)** take away from other important tasks that the non-profit or small business could be focusing their efforts on in the growth phase of their organization such as fundraising.

Therefore, our proposed structure is different from those listed above, and it mimics a structure that colleges and universities use all around the country: a **Student-Clinic**. One clear example of this would be the law clinics at the University of Notre Dame that exist to create an environment, "where students work as lead attorneys on real cases under the close supervision of seasoned faculty members" (University of Notre Dame). This mission would be the same for this accounting clinic, except students would not be working as attorneys, but as staff accountants. In having discussions with an experienced non-profit attorney during this KLA project, he recommended that this be the model I propose. He shared that in the model of a student-clinic, the clinic could charge market-rate for the services they are providing legally; the clinic could also work with any type of organization it wanted, and the clinic would be able to receive restricted funding to support the program because the school it was operating underneath would already be organized as a non-profit. If the clinic were organized as a new non-profit organization it would need to charge substantially below market rate for its services, it would need to work only with other tax-exempt organizations, and the fundraising efforts would be more difficult to organize.

This proposed structure requires a partnership with a local college/university. I am excited to share that there has been momentum in the conversations that the five-person AccountAbility board and I have been having with local colleges/universities as well as the local high-school. I have an upcoming presentation to the advisory board of one of these institutions to gauge their interest in partnering with me to help make this student-clinic a reality here in our community. I look forward to what may come of this.

Proposed Clinic Structure

This section of the report will focus on some of the specific details of how the student-clinic would function. The general framework for the student experience would be as follows:

1) Hire students as staff accountants in training at the college and high-school level to work in the clinic. Students will be selected for interviews based on references and applications to participate in the clinic. The desire is to pay them at a reasonable rate of approximately \$15 an hour, which is much higher than most other student positions when working on a college campus. Our students would likely be asked to work a minimum of 5 hours a week / 20 hours a month and a maximum of 20 hours a week / 80 hours a month.

2) Faculty members or clinic supervisors would guide the selected students through a detailed training in each of the service areas we are proposing to assist our clients with: **Bookkeeping, Payroll, Financial Reporting, Policy Creation, Budgeting and Forecasting, Grant Reporting, Audit Management and Tax Management** (*see a further outline of each in Appendix A*). The proposed timing of this training will continue to be discussed. Ideally it would take place either over summer break or winter break depending on the start date of the incoming student-hires to prepare them before they are back on campus full-time. The training courses would be set up as workshops and any students would be welcomed to attend, even if they were not chosen at that time to participate in the clinic. This would be one way we would generate engagement with the clinic from a broader student population to recruit from to ensure consistent staffing.

3) All student workers will be assigned to certain clients, which have agreed to receive specific services from the clinic. In their agreement with the clinic, the clients will understand that they will be providing an agreed amount of supervision over the student workers. We desire the relationship to be structured this way because there was a significant number of

the non-profits that we met with that described their current “bookkeepers” as passionate and skilled, while also being overextended from the number of hours that are required from them in these, typically volunteer, efforts. Therefore, we believe if we could show that the student workers we have employed could help alleviate a large amount of these hours from these experienced and gifted “bookkeepers” they would welcome our clinic. We would suggest that the current “bookkeeper” would still be seen as essential to our clinic as they would be able to serve in a role that is more focused on reviewing the work of the students, instead of performing all the services for their non-profit by themselves every month. This would limit the amount of internal faculty that the clinic would need to hire and likely provide an experienced professional that could guide the students in valuable real-world experiences.

4) Depending on their age/year in school/major, the students will have different responsibilities in each of these service areas for their respective clients. The specifics of this model will be difficult to know exactly until we could potentially pilot the clinic with a smaller group of students. We hope that the students will also have the opportunity to earn bonuses/incentives for high performance.

5) We will strive to provide a robust internship evaluation process that will require evaluations to be completed at the onset of hiring a student, throughout that student’s employment, and at the conclusion of their employment. This process will help to ensure learning objectives are being met and review comments are not being repeated, as it is our hope that the students are growing in their understanding of processes, client service, and personal leadership skills.

Proposed Pricing and Funding Sources

As noted above in the “Proposed Clinic Structure” section of this report, one of the key aspects of how the AccountAbility clinic will be sustainable is through the generosity and support of local organizations that believe in the mission of the clinic. This is the case because it is our desire not to charge market rate for these services, but to provide the services to our clients at a discounted rate. As a result, it is unlikely that the clinic will be generating significant profit margins to sustain itself immediately. In the proposed clinic model, we will be working to obtain sponsorships from local community-focused organizations that see the benefit of the work and services we will seek to provide for our clients. We will also seek sponsorship from local accounting firms that could assist us in how to best use accounting software’s that meet the needs of our clients as well as a general sharing of their

resources for the benefit of the students' learning experience and our client's success. Through the conversations we have had to this point, we have reason to believe that we will have several partners/sponsors that want to support this clinic here in our community to ensure its long-term success.

In this model we would not seek to charge a flat hourly rate for every client but instead would review each situation carefully and evaluate factors such as complexity, resources required, and client revenue to define the rate that we would charge certain clients. Before any agreements are entered into, we will communicate the agreed upon rate directly with the client. For the purpose of gauging potential gross revenue, I wanted to provide a few hypothetical client examples below:

Example A: Client A currently 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. If the AccountAbility clinic came in and provided very similar services and charged \$20/hour instead of \$30/hour and still worked 10 hours, but now asked the part-time bookkeeper to work only 3 hours a month reviewing the work of our clinic, they would now be paying \$290 a month for 3 more hours of invested time in their accounting. This would result in gross revenue of \$2,400 for the year for the clinic for an estimated 120 hours of work. This work could be completed in our student model by one student.

Example B: Client B is larger organization that currently has two staff positions dedicated to their in-house accounting operation, an outsourced accountant, and over 20 total employees; however, one of those positions that assists with the accounting function is the CEO (who is a former bookkeeper) dedicating a significant amount of their hours to ensure that things are done correctly. The CEO has noted that they do not love their current personal investment of hours to provide accounting for their non-profit, which would be a big reason they may choose to engage with the AccountAbility clinic. They noted that when they may not have the time to investigate something, they have to pay their outsourced accountant \$150/hour to provide the proper assistance. If the AccountAbility clinic came in to take on some of the monthly hours the CEO is currently dedicating to their accounting processes, as well as assist with some of the questions that may come up during the year for \$30/hour and worked approximately 5 hours a week or 20 hours a month that would result in gross revenue of \$7,200 for the year

for the clinic for an estimated 240 hours of work. This work could be completed in our student model by one student.

Example C: Client C is a much smaller organization that has never paid for any accounting services but instead has relied completely on volunteers. This client has a strong growth potential, and their board is ready to move into a growth stage. They currently have stated that they can budget \$150 a month for accounting services and would require 10 hours of weekly support or 40 hours a month. Therefore, the AccountAbility clinic would seek to work within their budget requirements to ensure that they receive the assistance they are looking for. To do this our clinic would suggest charging them \$5/hour for 10 hours a week that would result in gross revenue of \$2,400 for the year for the clinic for an estimated 480 hours of work. This would result in \$50 more of cost each month for the client, but we believe this is the lowest we could charge for our services in this scenario. This work could be completed in our student model by one student.

As you can see, these are three very different scenarios, with three different hourly rates. However, based on our conversations, we believe that these three clients would all be willing to pay these amounts for the services we would be providing. We also believe that it is extremely important to note that in each of these scenarios, our clinic model would provide us with great flexibility to utilize minimal staff positions and to limit overhead costs of providing these services to these impactful organizations in our local community.

Why Would Someone Want to Hire Us? Or Work for Us?

As we exit the conversations above about the overall clinic and pricing structure, I want to re-emphasize what we believe to be the true value proposition of the AccountAbility clinic:

We will be providing clearly needed accounting services for our local community of non-profits and small businesses, while promoting a culture of AccountAbility, where staff members and board members alike can feel more educated, confident and comfortable. We will do this all with the hope that we continue to promote healthy financial stewardship across all generations here in our community. I would be remiss if I did not share that we have heard directly from the students here in our community that they want to be a part of impacting the community around them! They have a desire to bump into real-world problems and experience what it looks like to take ownership of a client's needs. At the same time, our

potential clients long for these types of employees to help impact the future state of their respective organizations.

KLA Mini-Grant

It was extremely helpful to have access to the KLA Mini-Grant as a part of this whitepaper project! Our project utilized the mini-grant for the following items 1) the use of a project management software called AirTable - which was how we sent out our survey and compiled the results in a clear and presentable format and 2) the costs of meals/coffee for all of the meetings that I was able to have with a wide variety of community members. Each of these uses helped immensely with the ease of gathering information and compiling it to be able to present in this report and my project-proud presentation. Thank you, KLA!

Northenor Award Potential

If AccountAbility Kosciusko were to be selected for the Northenor Award, we would dedicate the award dollars to be spent exclusively on the first cohort of student's wages. The award dollars would be unlikely to fund an entire semester, but we would use this award as long as possible to help fund the very important work that these students would be accomplishing here in our county. We believe this reflects the very heart of KLA to "*invest in the emerging leaders of our community.*"

Recommendations and Next Steps

- 1) We will be proposing this clinic model to one of the local colleges to see if they would be willing to adopt this clinic at their school and assist with a potential pilot of the organization.
- 2) If we receive a partnership agreement with a local college/university, we will push hard to obtain program funding from local organizations to help support our initial costs for our pilot.
- 3) We will continue to refine the clinic structure and the specifics of the pricing structure to prepare for the potential pilot. Our goal for a potential pilot to begin would be January of 2027.
- 4) We will work with the college/university partner to select the most qualified student employees for our clinic, ensuring that their skillset and vision aligns with our proposed vision.

- 5) Nine organizations have shared that they would potentially participate in a pilot if we got something off the ground. However, we likely would only be able to support 2-3 organizations in our initial pilot and must weigh several factors in selecting our first clients.

CONCLUSION

In summary, this report reflects the insights we have gained and our vision for how these learnings can inform meaningful service for organizations across our community. We believe there is a clear opportunity to support local businesses and not-for-profits with their accounting service needs while simultaneously creating a unique, hands-on learning environment for students within our local workforce. This initiative has the potential to bridge the gap between academic knowledge and real-world application, an experience that many students would otherwise struggle to obtain.

The effort invested in this project represents more than research alone; it demonstrates collaboration, forward-thinking, and a shared commitment to community development. None of this progress would have been possible without the guidance, resources, and support of the Kosciusko Leadership Academy, whose role has been instrumental in developing the potential realities of this concept.

Thank you for taking the time to review this report and for your willingness to provide feedback. We look forward to the opportunities that may arise from this work and remain optimistic about the positive impact this initiative can have on both local organizations and aspiring professionals within our community

APPENDIX A – SERVICE GOALS

Bookkeeping

Not-for-profit bookkeeping is the process of tracking your organization's day-to-day activity. With a strong bookkeeping system, your not-for-profit can ensure financial accountability and transparency, comply with federal and state regulations, and have a detailed support of your finances to help in the entire accounting process.

Payroll

Payroll oversight for a non-profit ensures that all employees, contractors, and grant-funded staff are paid accurately, on time, and in compliance with federal, state, and local regulations. It involves calculating wages, managing payroll taxes, tracking benefits and deductions, and allocating labor costs to specific programs or grants as required. Effective payroll management helps non-profits maintain transparency, meet grantor and audit expectations, and support strong financial stewardship while allowing staff to stay focused on mission driven work.

Financial Reporting

Financial reporting assistance would help provide a clear, accurate picture of how the organization manages and uses its resources to fulfill its mission. It includes preparing statements such as the Statement of Financial Position and Statement of Activities, along with tracking restricted and unrestricted funds. Transparent reporting helps non-profits demonstrate accountability to donors, grantors, board members, and the community, while ensuring compliance with regulatory and audit requirements.

Policy Creation

Policy creation and retention for a non-profit ensures the organization operates with consistency, transparency, and legal compliance. Clear policies outline expectations for governance, financial management, personnel practices, and operational procedures, helping protect the organization and its stakeholders. A strong retention process ensures these policies are properly documented, regularly reviewed, updated as regulations change, and securely stored for easy access by staff, board members, and auditors. This structured approach supports accountability and strengthens long-term organizational stability.

Budgeting and Forecasting

Budgeting and forecasting for a non-profit involve planning and projecting the financial resources needed to support programs, operations, and mission driven activities. A well-prepared budget outlines expected income from donations, grants, and funding sources alongside anticipated expenses, ensuring responsible stewardship of resources. Forecasting extends this work by analyzing trends and adjusting projections throughout the year, helping leaders make informed decisions, adapt to funding changes, and maintain long-term financial sustainability.

Grant Reporting

Grant reporting for a non-profit involves tracking, documenting, and communicating how grant funds are used to support mission driven programs and activities. This includes preparing timely financial and programmatic reports that detail expenditures, progress toward goals, and outcomes achieved, ensuring full compliance with grantor guidelines. Effective grant reporting strengthens transparency, builds trust with funders, and increases the organization's likelihood of receiving future grant support.

Audit Management

Audit management for a non-profit involves coordinating, preparing, and supporting the organization through its annual financial audit to ensure transparency, compliance, and strong stewardship of resources. This includes organizing financial records, maintaining proper documentation, facilitating communication with external auditors, and ensuring adherence to accounting standards and regulatory requirements. Effective audit management helps non-profits identify areas for improvement, strengthen internal controls, and build trust with donors, grantors, and the community.

Tax Management

Tax management for a non-profit ensures the organization complies with all federal, state, and local tax regulations while maintaining its tax-exempt status. This includes helping coordinate the filing of the IRS Form 990 with a tax preparer. Helping manage payroll-related tax obligations, tracking deductible contributions, and ensuring proper documentation for grants and fundraising activities. Effective tax management helps non-profits avoid penalties, maintain transparency, and demonstrate responsible stewardship to donors, regulators, and the community.

APPENDIX B – 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/>

APPENDIX C – POWERPOINT SLIDES

AccountAbility Kosciusko

Lukas Rife - OrthoWorx

1

Stakeholder Interviews

The collage includes logos for the following organizations:

- POTAWATOMI WILDLIFE PARK
- KOSCIUSKO COUNTY COMMUNITY FOUNDATION
- CCAC (City County Athletic Center)
- faegre drinker
- INSPIRE-IN.ORG
- Kosciusko Drug-Free
- WARSAW AREA CAREER CENTER
- GRACE COLLEGE
- Fellowship missions
- LIVE WELL Kosciusko
- K21 HEALTH FOUNDATION
- LITE (Living in Transition Effectively)
- WinonaWealth
- EnPak
- Grace SOLUTIONS
- Lost Sparrows
- ORTHOLAZER (Your Orthopedic Wellness Center)
- UNITED WAY WHITLEY & KOSCIUSKO
- North Webster Community Public Library
- INDIANA Small Business Development Center
- Winona IT
- SYM FINANCIAL ADVISORS
- HEALTH SERVICES PAVILION
- WAGON WHEEL CENTER FOR THE ARTS
- Lakeland Art Center & Gallery
- JOES KIDS (Achievement Place)
- BAKER YOUTH CLUB BYC

2

Background, Problem Defined



Key Takeaways From Meetings



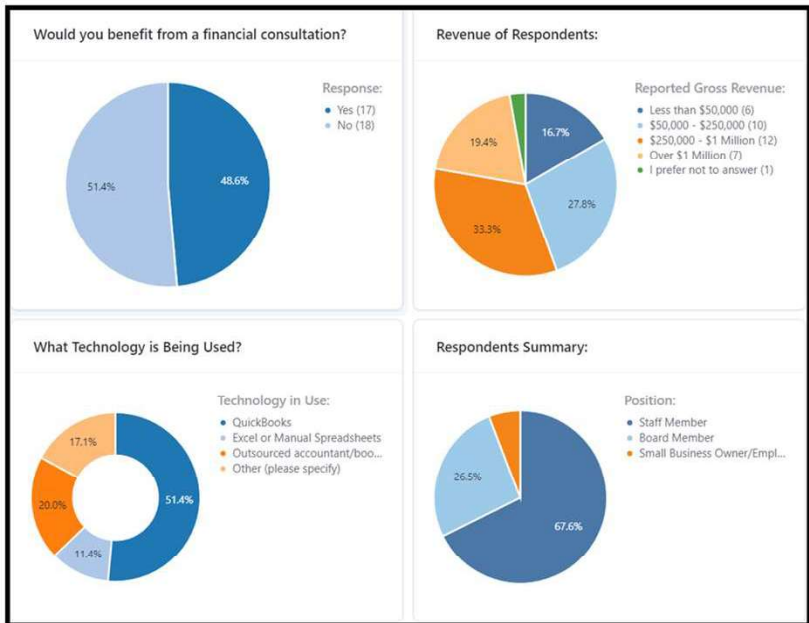
Advisory Board Formed



Financial Services Interest Survey

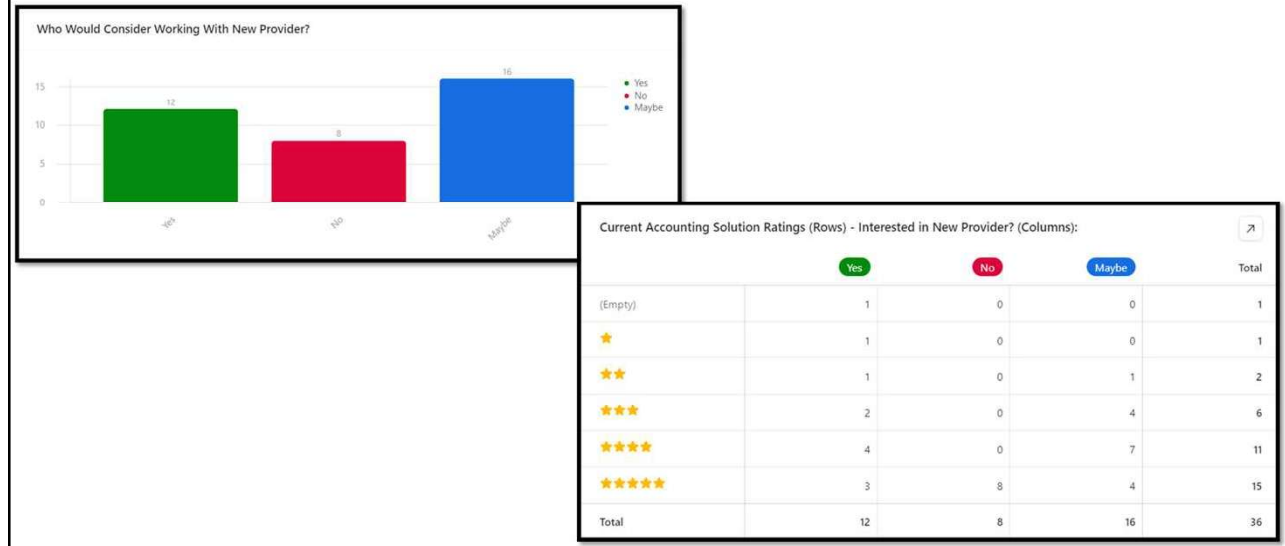
3

Survey Results Summary



4

Survey Results Summary (Continued)



5

+
○

Proposed Legal Structure – Student Clinic Model

+
○

6

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.

7

Proposed Pricing and Funding Sources



Will be different pricing
depending on the client.



Strong desire for partnerships
with local
organizations/accounting firms.

8

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.**

9

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.

10

Northenor 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”.

11

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**

12

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/>

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Questions?

Lukas.rife@orthoworxindiana.com

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