

**From:** Lyon, Marlea <Marlea.Lyon@farmcreditwest.com>  
**Sent:** Thursday, March 01, 2018 4:29 PM  
**To:** Crystal VanderTuig; Mark Perry; Mike Perry; John Swiger; 'Susang1953@hotmail.com'; Sue DeLong; 'jill.sozinho@tulare.k12.ca.us'  
**Cc:** Angela Heinz  
**Subject:** RE: BoG Approval of OTA Fresno Execution Proposal

Approved.

---

**From:** Crystal VanderTuig [<mailto:Crystal.VanderTuig@sjvc.edu>]  
**Sent:** Thursday, March 01, 2018 8:44 AM  
**To:** Mark Perry <[MarkP@sjvc.edu](mailto:MarkP@sjvc.edu)>; Mike Perry <[CEO@sjvc.edu](mailto:CEO@sjvc.edu)>; John Swiger <[JohnS@sjvc.edu](mailto:JohnS@sjvc.edu)>; 'Susang1953@hotmail.com' <[Susang1953@hotmail.com](mailto:Susang1953@hotmail.com)>; Sue DeLong <[suempell@gmail.com](mailto:suempell@gmail.com)>; 'jill.sozinho@tulare.k12.ca.us' <[jill.sozinho@tulare.k12.ca.us](mailto:jill.sozinho@tulare.k12.ca.us)>; Lyon, Marlea <[Marlea.Lyon@farmcreditwest.com](mailto:Marlea.Lyon@farmcreditwest.com)>  
**Cc:** Angela Heinz <[Angela.Heinz@sjvc.edu](mailto:Angela.Heinz@sjvc.edu)>  
**Subject:** FW: BoG Approval of OTA Fresno Execution Proposal  
**Importance:** High

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Thank you,  
Crystal

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**Sent:** Tuesday, February 27, 2018 9:52 AM  
**To:** Crystal VanderTuig <[Crystal.VanderTuig@sjvc.edu](mailto:Crystal.VanderTuig@sjvc.edu)>  
**Cc:** Senior Management <[SeniorManagement@sjvc.edu](mailto:SeniorManagement@sjvc.edu)>  
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Thanks,  
Angela

 **Angela Heinz** | Director of Growth & Development

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**From:** Mark Perry  
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**To:** Crystal VanderTuig  
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Approved.


---

Mark Perry  
*Chairman of the Board of Directors*  
 San Joaquin Valley College®

Central Administrative Office  
[3828 W. Caldwell Ave](#)  
[Visalia, CA 93277](#)  
P. [559.734.9000](#)  
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Personal:  
[Mark@mkperry.com](mailto:Mark@mkperry.com)  
C: 559-786-5999

*Sent from my  iPhone*

On Mar 1, 2018, at 10:45 AM, Crystal VanderTuig <[Crystal.VanderTuig@sjvc.edu](mailto:Crystal.VanderTuig@sjvc.edu)> wrote:

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Thanks,  
Angela

<image001.png>**Angela Heinz** | Director of Growth & Development  
San Joaquin Valley College | *Office* 559-302-2067 | *Mobile* 559-696-3686

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<OTA Execution Proposal vF 02.23.2018.docx>

<OTA Fresno Appendices.pdf>

**From:** Mike Perry  
**Sent:** Thursday, March 01, 2018 12:48 PM  
**To:** Crystal VanderTuig; Mark Perry; John Swiger; 'Susang1953@hotmail.com'; Sue DeLong; 'jill.sozinho@tulare.k12.ca.us'; 'marlea.lyon@farmcreditwest.com'  
**Cc:** Angela Heinz  
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Approved

Michael D. Perry  
President & CEO  
San Joaquin Valley College  
Central Administrative Office  
3828 W. Caldwell Ave  
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[ceo@sjvc.edu](mailto:ceo@sjvc.edu)

[www.sjvc.edu](http://www.sjvc.edu)

---

**From:** Crystal VanderTuig  
**Sent:** Thursday, March 1, 2018 8:43:40 AM  
**To:** Mark Perry; Mike Perry; John Swiger; 'Susang1953@hotmail.com'; Sue DeLong; 'jill.sozinho@tulare.k12.ca.us'; 'marlea.lyon@farmcreditwest.com'  
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**From:** Susan Good <susang1953@hotmail.com>  
**Sent:** Thursday, March 01, 2018 8:48 PM  
**To:** Crystal VanderTuig  
**Subject:** Re: BoG Approval of OTA Fresno Execution Proposal

I, Susan Good, approve.

Sent from my iPhone

On Mar 1, 2018, at 8:45 AM, Crystal VanderTuig <[Crystal.VanderTuig@sjvc.edu](mailto:Crystal.VanderTuig@sjvc.edu)> wrote:

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<OTA Execution Proposal vF 02.23.2018.docx>  
<OTA Fresno Appendices.pdf>

**From:** Jill Sozinho <jill.sozinho@tulare.k12.ca.us>  
**Sent:** Thursday, March 01, 2018 10:20 AM  
**To:** Crystal VanderTuig  
**Cc:** Mark Perry; Mike Perry; John Swiger; Susang1953@hotmail.com; Sue DeLong; marlea.lyon@farmcreditwest.com; Angela Heinz  
**Subject:** Re: FW: BoG Approval of OTA Fresno Execution Proposal

Approved

Jill Sozinho

Tulare Western High School

English Teacher

PreMed Academy Teacher

Journalism Advisor

CSF Advisor

(559) 686-8751

On Thu, Mar 1, 2018 at 8:43 AM, Crystal VanderTuig <[Crystal.VanderTuig@sjvc.edu](mailto:Crystal.VanderTuig@sjvc.edu)> wrote:

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**From:** John Swiger  
**Sent:** Tuesday, March 06, 2018 6:49 AM  
**To:** Sue DeLong; Crystal VanderTuig  
**Cc:** Mark Perry; Mike Perry; Susang1953@hotmail.com; jill.sozinho@tulare.k12.ca.us; marlea.lyon@farmcreditwest.com; Angela Heinz  
**Subject:** Re: FW: BoG Approval of OTA Fresno Execution Proposal

Approved

---

**From:** Sue DeLong <[suempell@gmail.com](mailto:suempell@gmail.com)>  
**Sent:** Monday, March 5, 2018 12:51 PM  
**To:** Crystal VanderTuig  
**Cc:** Mark Perry; Mike Perry; John Swiger; [Susang1953@hotmail.com](mailto:Susang1953@hotmail.com); [jill.sozinho@tulare.k12.ca.us](mailto:jill.sozinho@tulare.k12.ca.us); [marlea.lyon@farmcreditwest.com](mailto:marlea.lyon@farmcreditwest.com); Angela Heinz  
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**From:** Sue DeLong <suempell@gmail.com>  
**Sent:** Monday, March 05, 2018 12:51 PM  
**To:** Crystal VanderTuig  
**Cc:** Mark Perry; Mike Perry; John Swiger; Susang1953@hotmail.com; jill.sozinho@tulare.k12.ca.us; marlea.lyon@farmcreditwest.com; Angela Heinz  
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# Occupational Therapy Assisting

## Evaluation Summary & Recommendation – February 2018

### **Proposal and Recommendation**

The Growth and Development team recommends to Senior Management that the College approve the addition of an Occupational Therapy Assisting (OTA) program at the Fresno campus. We anticipate the proposed program will start its first cohort in the Fall of 2019. This recommendation is a result of an evaluation completed by the Growth and Development team, including submitting a letter of intent (approved by Senior Management and Board of Governors) to the Accreditation Council for Occupational Therapy (ACOTE) in May of 2017.

### **Strategic Evaluation**

The evaluation of this creation was considered through the lens of SJVC's strategic objectives:

#### Increase Campus & Program Offerings

The proposed creation is a result of the Growth and Development team identifying, extensively researching, and responding to an opportunity to create a new medical program for an underserved market. The addition of an OTA program would generate a new source of revenue and increase the number of linear medical programs offered by the College.

#### Enroll Capable Applicants

The number of students we can enroll each year is limited to the number of clinical sites secured (we need two slots for every student). The projected start budget anticipates we will start three cohorts of 20 students in the first 24 months of operation. This number is comparable to the three smallest of the existing programs in California. Our Program Director (consultant) is actively pursuing available clinical sites to grow the program to more than 20 student cohorts. We anticipate we will have a more accurate assessment of our projected starts within the next six to eight weeks (Appendix A: Marketing & Starts Budget).

The enrollment process will be highly selective and very similar to our RN program's enrollment process. Applicants will be required to complete a minimum of 29 units of general education prerequisite coursework with a GPA of 2.5 or higher.

### **Demand Assessment**

The Growth and Development team already has a small list of unsolicited inquiries who have reached out to our college. We believe this number will grow, merely by word of mouth, once we reach out to sites to secure agreements and communication begins to spread within the industry in the area. We have surveyed over 35 occupational therapy rehabilitation departments and had overwhelmingly positive feedback on a need for OTA career training in the area.

Google's predicted number of inquiries are low, however, the results are comparable to other linear programs offered by SJVC and may be due to the fact no one is currently offering a program nearby. (Appendix B: OTA Demand Assessment)

### **Competitive Analysis**

There are currently only six OTA programs offered in California, none of which are located in the Central Valley. The nearest OTA program from Fresno is in Sacramento. Clovis Community College has also

submitted a letter of intent. To the best of our knowledge, we believe we are further along in the program development process and will likely launch our program first. We do not anticipate a second program nearby will prevent us from identifying and enrolling prospects. Both colleges will likely be limited to the number of students enrolled each year, still leaving an unmet need to fulfill in the community. (Appendix C: OTA Competitive Analysis)

#### Achieve Course Success

The curriculum for the proposed program will be offered over four 20-week terms. During the first three terms, students will participate in didactics three days a week and clinicals over the other two days. The last semester will be devoted to completing their clinicals. ACOTE's regulations state the faculty—student ratio must be compatible with accepted practices of the institution for similar programs.

Since the enrollment process for the proposed program will be selective with a significant amount of prerequisites required, it is reasonable to say the nature of the students enrolled will produce successful course outcomes. Our Program Director predicts it will not be unusual for program students to have already earned a four-year degree.

#### Ensure Career Readiness

Graduates of the proposed program will receive the necessary training to have the professional skills required for employment in their industry. In addition to didactics, students will complete 105 observatory hours in Level I sites and 640 hands-on hours in Level II sites.

#### Achieve Academic Success

Considering the proposed OTA program will enroll and serve a student population like our RN program, we expect the graduation outcomes will be like Visalia RN (88% in 2017), which will also contribute to the College successfully achieving our institutional graduation rate.

Graduates will earn an Associate Degree in OTA and are eligible to take the national certification examination administered by the National Board for Certification in Occupational Therapy (NBCOT), a requirement to practice as a Certified Occupational Therapy Assistant. The average pass rate over the three most recent calendar years for graduates attempting the NBCOT exam within 12 months of graduation must be 80% or higher.

#### Achieve Professional Success

ACOTE standards do not include a placement rate standard. The proposed program would be required to secure and document sufficient qualitative and quantitative information to analyze if the program is meeting its goals and objectives, including graduates' job placement and performance as determined by employer satisfaction.

Occupational Therapy Assistants are in demand. As noted above, surveyed employers have indicated there is a need for more OTAs. According to the Employment Development Department (EDD), job opportunities for OTAs are projected to grow nearly 40% over a 10-year span (2014-2024). (Appendix D: EDD Employment Data) This month the President signed into law a permanent repeal of the cap on Medicare out-patient therapy services ([www.aota.org](http://www.aota.org)). We should continue to see an increase in the demand for OTAs because more Medicare beneficiaries will now be able to afford the occupational therapy services they need.



We have surveyed over 35 occupational therapy rehabilitation departments. Every rehab department we were able to connect with indicated they had a difficult time hiring OTAs. They also stated they had a current or projected need for OTAs and would welcome our students for clinical rotations (Appendix E: Employer Survey Results).

We expect graduates will have low Cohort Default Rates (CDR), similar to our RN graduates (less than 2%).

#### Increase SJVC Presence

The mature census for the proposed program will be around 35 students. This is minimal but will expand the number of linear programs offered by the College and create a stronger presence in the Fresno area. At maturity, this program is expected to generate \$900K a year in revenue with a 30% operating margin.

#### Ensure Financial Stability

The Fresno OTA program is projected to generate \$1.5M in revenue in the first 24 months. The campus will have positive cash flow by the month ten and will begin to see a return on its investment near the beginning of the third year of operation. The proposed program is predicted to have an ongoing gross profit around 40%. (Appendix F: OTA Fresno Proposed Budget Summary & Income Statement).

### **Operational Considerations**

#### Curriculum Development

Together, with our content expert, the College has been working diligently on curriculum development for the proposed program. We anticipate the curriculum will be complete near the end of the year and ready to submit to ACOTE in March of 2019.

#### Accreditation and Approvals

The College would need to first secure accreditation status from WASC. The application process to secure programmatic accreditation is extensive. ACOTE requires interested educational providers secure a Program Director and submit a letter of intent in order to secure a letter to submit our candidacy application. As noted above, the Growth and Development team has fulfilled both of these requirements. We will also need to secure approvals through BPPE and USDE. (Appendix G: Accreditation and Approvals Timeline)

We anticipate graduates of the certificate programs to meet the debt-to-earnings ratio required for eligibility under Gainful Employment.

#### Facilities and Equipment

Key stakeholders visited an OTA program in southern California to assess the appropriate facilities needed for this program. Our program will require a designated space for didactics and lab. The space available at the Fresno campus will need to be reevaluated as we come closer to a launch. Our Program Director also created an extensive list of equipment and supplies needed to execute an OTA program successfully.

## Appendices: Fresno Occupational Therapy Assisting

<b>Appendix A: Marketing &amp; Starts Budget .....</b>	<b>1</b>
<b>Appendix B: OTA Demand Assessment .....</b>	<b>3</b>
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<b>Appendix F: OTA Fresno Proposed Budget Summary &amp; Income Statement .....</b>	<b>7</b>
<b>Appendix G: Accreditation and Approvals Timeline .....</b>	<b>11</b>

## Appendix A: Marketing & Starts Budget

Campus	Program		Oct-2019		Nov-2019		Dec-2019		Jan-2020		Feb-2020		Mar-2020		TOTAL
FRE	OTA	\$	20,000	\$	15,000	\$	15,000	\$	10,000	\$	10,000	\$	10,000	\$	<b>80,000</b>
	<b>TOTAL</b>													\$	<b>80,000</b>

Select first start date: 1/6/2020							
		Start Date					
Campus	Program	6-Jan-20	19-Oct-20	2-Aug-21	16-May-22	27-Feb-23	Total
FRE	OTA	16	16	16	16	16	80

### Google Search Volume

The analysis compares all keywords currently used for our program advertising with existing programs vs. keywords that will likely will be used for the proposed OTA program in the Fresno market. The following is what Google estimates the monthly average results will be. <sup>1</sup>

Program	Searches	Clicks
<b>OTA</b>	365	13
<b>RT</b>	1,490	51
<b>MA</b>	12,859	301
<b>RN*</b>	13,761	412

\*Fresno City College currently offers one of the largest RN programs in CA.

<sup>1</sup> **Source:** Google Keyword Planner;

## Appendix C: OTA Competitive Analysis

College	Location	Length (weeks)	Tuition	SPFS Starts	SPFS Starts	YR 16 Grad	
				YR15	YR16	IPEDS YR16	Rate
American Career College	Anaheim	80	###	33	44	24	64%
CBD College	Los Angeles	82	###		57		
Grossmont College	El Cajon	104	\$5,800	26	26	18	69%
Sacramento City College	Sacramento	6	\$2,255	33	33	27	90%
Santa Ana College	Santa Ana	4	\$3,312	Avg. 60 starts a year from Fall13 to Spring 15.		53	86%
Stanbridge University	Irvine	104 or 130	###	140	105	99	90%

**Appendix D: EDD Employment Data**

Employment Development Department

Labor Market Information Division

Published: January 2017

**2014-2024 Occupational Employment Projections  
Fresno Metropolitan Statistical Area  
(Fresno County)**

SOC Code*	Occupational Title	Estimated Employment 2014**	Projected Employment 2024	Numeric Change 2014-2024 [1]	Percent Change 2014-2024	Annual Average Percent Change	Average Annual Job Openings			2016 First Quarter Wages [5]		Education and Training Levels [7]		
							New Jobs [2]	Replacement Needs [3]	Total Jobs [4]	Median Hourly	Median Annual	Entry Level Education	Work Experience	On-the-Job Training
31-2000	Occupational Therapy and Physical Therapist Assistants and Aides	250	340	90	36.0%	3.6%	8	7	15	N/A	N/A			

\* The Standard Occupational Classification (SOC) system is used by government agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data.

\*\* Data sources: U.S. Bureau of Labor Statistics' Current Employment Statistics (CES) March 2015 benchmark, Quarterly Census of Employment and Wages (QCEW) industry employment, and Occupational Employment Statistics (OES) data.

Occupational employment projections include self-employed, private household workers, farm, and nonfarm employment.

N/A - Information is not available.

Occupations with employment below 50 in 2014 are excluded.

Occupation subtotals may not add to the totals due to rounding and the suppression of data.

The use of occupational employment projections as a time series is not encouraged due to changes in the occupational, industrial, and geographical classification systems; changes in the way data are collected; and changes in the OES survey reference period.

- [1] Numerical employment change is the net difference between the base and projected year employment and reflects job growth or decline. The base and projected year employment are independently rounded to 10. Therefore, numerical change may not equal new jobs.
- [2] New jobs are only openings due to growth and do not include job declines. If an occupation's employment change is negative, there is no job growth and new jobs are set to zero. New jobs may not equal numerical change.
- [3] Replacement needs estimate the number of job openings created when workers retire or permanently leave an occupation and need to be replaced.
- [4] Total jobs are the sum of new jobs and replacement needs.
- [5] Median hourly and annual wages are the estimated 50th percentile of the distribution of wages; 50 percent of workers in an occupation earn wages below, and 50 percent earn wages above the median wage. The wages are from 2016 first quarter and do not include self-employed or unpaid family workers.
- [6] In occupations where workers do not work full-time all year-round, it is not possible to calculate an hourly wage.
- [7] The Bureau of Labor Statistics develops and assigns education and training categories to each occupation (see tables below). For more information please see [http://www.bls.gov/emp/ep\\_education\\_training\\_system.htm](http://www.bls.gov/emp/ep_education_training_system.htm)

Entry Level Education
1- Doctoral or professional degree
2- Master's degree
3- Bachelor's degree
4- Associate's degree
5- Postsecondary non-degree award
6- Some college, no degree
7- High school diploma or equivalent
8- No formal educational credential

Work Experience Codes	
≥5 years	5 years or more experience in a related occupation or field is common.
<5 years	Less than 5 years experience in a related occupation or field is common.
None	No work experience is typically required.

On-the-Job Training	
I/R	Internship/Residency
APP	Apprenticeship
LT OJT	Long-term on-the-job training
MT OJT	Moderate-term on-the-job
ST OJT	Short-term on-the-job training
None	None

## Appendix E: Employer Survey Results

### Potential Clinical Site Listing for COTA (in progress)

Name of Facility	Contact	Title	Email	Phone	Address	City	Zip Code	Level I slots available	Level II slots available	Avg. starting hr. wage
Golden Living- Chowchilla	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	707-694-6082		Chowchilla	93706	1	1	\$33-\$34
San Joaquin Nursing & Rehab (owned by Providence)	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		3601 San Dimas	Bakersfield		1	1	
Dycora- Clovis	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	559 299-2591	111 Barstow Ave	Clovis	93612	1	1 or 2	\$33-\$34
Dycora - Community Care	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		3672 N. First Street	Fresno	93726	1	1	#
Dycora - Fresno	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	559 486-4433	2715 Fresno	Fresno	93721	1	1	#
Dycora - Fowler	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	834-2542	1306 E. Sumner	Fowler	93625	1	1	#
Dycora- Reedley	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	638-3577	1090 E. Dinuba	Reedley	93654	1	1	#
Dycora - Sanger	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	875-6501	2550 9th Street	Sanger	93657	1	1	#
Dycora - Manchester	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>	280-1057	3408 E. Shields	Fresno	93726	1	1 or 2	#
Dycora- Shafter	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		140 E. Tulare	Shafter	93263	1	1	#
Dycora - Stockton (Quail Lake)	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		1221 Rosemarie Lane	Stockton	95207	1	1	#
Dycora - stockton	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		4545 Shelley Court	Stockton	95207	1	1	#
Dycora-Weber Oaks	Matthew Kearns	Area VP	<a href="mailto:matthew.kearns@aegistherapies.com">matthew.kearns@aegistherapies.com</a>		2740 N California Street	Stockton	95204	1	1	#
Childrens Hospital Central California	Carol Kurushuma	Director	<a href="mailto:ckurushuma@childrenscentralcal.org">ckurushuma@childrenscentralcal.org</a>		9300 Valley Childrens Place	Madera	93738	1		#
San Joaquin Valley Rehab Hospital	Paul Herrera	Regional HR Dir	<a href="mailto:pherrera@sjvrehab.com">pherrera@sjvrehab.com</a>	436-3649	7171 N. Sharon	Fresno	93720		1	
Lindsey Pimental Hand Therapy	Lana Alvarado	Office Manager	<a href="mailto:administrator@lphsr.com">administrator@lphsr.com</a>	325-3503	7005 N. Maple #104	Fresno	93720	1		
		Associate								
Community Regional Medical Center	Robyn Gonzales	Administrator/OT DOR	<a href="mailto:rgonzales@communitymedical.org">rgonzales@communitymedical.org</a>	288-8773	2823 Fresno	Fresno	93721		1 or 2	
kaiser Medical Center Fresno	Sharon Thornbury	Director of Rehab	<a href="mailto:sharon.thornbury@kp.org">sharon.thornbury@kp.org</a>	448-4227	7300 N. Fresno St	Fresno	93720		1	
Health Care Center Fresno (Intergro contractor)	Sherie Diaz	DOR	<a href="mailto:sdiaz@intergrorehab.com">sdiaz@intergrorehab.com</a>	287-6215	1665 M Street	Fresno	93721		1	\$30-\$35
Horizon Health & Subacute Center	Samsom Salting	OTR/DOR	<a href="mailto:ssalting@horizonhealthfresno.com">ssalting@horizonhealthfresno.com</a>	321-0883	3034 E. Herndon	Fresno	93720		1	
ONR (contract Rehab agency)	Michelle Grissom	Corporate Rep	<a href="mailto:mgrissom@onr-inc.com">mgrissom@onr-inc.com</a>	800 967-2414		Bakersfield and Stockton			2	\$28-\$32
Willow Creek	Ted Munoz	DOR		559 323-6200 ext 406	650 W. Alluvial	Clovis	93611	2 or 3	2 or 3	
John Goodfellow Therapy	John Goodfellow	Owner/DOR	<a href="mailto:john@gftherapy.com">john@gftherapy.com</a>	559 907-7777		Fresno, Visalia, and Bakersfield		2 to 3	1 or 2	
Kawah Delta Health Care Dist.	Klara Bergholdt	Rehab Mang	<a href="mailto:kbergho@kdhcd.org">kbergho@kdhcd.org</a>	559- 624-3944		Visalia		2	2	
J&L Telesmanic Rehab	Joanne Telesmanic	Owner	<a href="mailto:jtelesmanic@gmail.com">jtelesmanic@gmail.com</a>	439-7041	7065 N. Chestnut	Fresno			4	
Adventist Hospital - Hanford	Adam Efrid	Manager	<a href="mailto:efirda1@ah.org">efirda1@ah.org</a>	559 537-2240	210 W. Lacey Blvd	Hanford	93230		2	
Blue Sky Wellness - (division of Kings View)	Diascha Goins	Volunteer Coordinator	<a href="mailto:dgoins@kingsview.org">dgoins@kingsview.org</a>	559 230-2501	1617 E. Saginaw	Fresno	93704	2 per week		
Dycora Fresno - Alzheimer's Wing	Ken Evans	Administrator	<a href="mailto:ken.evans@dycora.com">ken.evans@dycora.com</a>	310-384-6167	2715 Fresno	Fresno	93721	2 per week, 1 per day		
Dycora Memory Care of Fresno	Matthew Kearns	Area VP			925 N. Cornelia	Fresno	93706	2 per week, 1 per day		
Dycora Twin Oaks					897 M. Street	Tulare	93274		pending	
Dycora Porterville					1100 W. Morton	Porterville	93257		pending	
Dycora Memory Care Tulare					604 E. Merritt	Tulare	93275		pending	
Dycora Visalia					3710 W. Tulare Ave	Visalia	93274		pending	
Madera Rehab and Nursing (run by interfacer rehab)	Ricky Kwok	DOR	<a href="mailto:maderador@interfacerehab.com">maderador@interfacerehab.com</a>	559 673-9228	517 S. A Street	Madera	93638	1	1	
La Sierra Care Center (run by interfacer rehab)	Dinesh Gnanavel	DOR	<a href="mailto:merceddor@interfacerehab.com">merceddor@interfacerehab.com</a>	209 723-4224	2424 M Street	Merced	95340	1	1	
Merced Nursing and Rehab (run by interfacer rehab)	Dinesh Gnanavel	DOR	<a href="mailto:merceddor@interfacerehab.com">merceddor@interfacerehab.com</a>	209 723-2911	510 W. 26th Street	Merced	95340	1	1	
							<b>Totals</b>	<b>30-32</b>	<b>34-39</b>	



## Appendix F: OTA Fresno Proposed Budget Summary & Income Statement

San Joaquin Valley College  
Occupational Therapy Assistant  
Financial Budget Summary

Occupational Therapy Assistant				
	Start Up	1-12 Months	13-24 Months	Total
<b>Average Census</b>		<b>22</b>	<b>34</b>	
<b>Revenue</b>		\$ 579,369	\$ 919,898	\$ 1,499,267
<b>Direct Expense<sup>A</sup></b>				
Salaries	150,456	440,366	447,560	1,038,382
Text & supplies	-	20,066	23,862	43,928
Physicals	-	5,682	8,947	14,629
Lab Supplies	19,861	22,887	36,041	78,789
Cert./Licenses Exams	-	-	15,198	15,198
Library Resources	1,085	-	-	1,085
Consultant	39,000	-	-	39,000
Accreditation Fee	4,390	8,780	4,000	17,170
<b>Total Direct</b>	<b>\$ 214,792</b>	<b>\$ 497,781</b>	<b>\$ 535,608</b>	<b>\$ 1,248,181</b>
<b>Administrative Expense<sup>B</sup></b>				
Depreciation <sup>C</sup>	583	7,000	7,000	14,583
Non Capital	11,360	-	-	11,360
Marketing	50,000	30,000	-	80,000
Administrative Support	-	57,937	91,990	149,927
<b>Total Administrative</b>	<b>\$ 61,944</b>	<b>\$ 94,937</b>	<b>\$ 98,990</b>	<b>\$ 255,870</b>
<b>Net Income<sup>D</sup></b>	<b>\$ (276,736)</b>	<b>\$ (13,348)</b>	<b>\$ 285,300</b>	<b>\$ (4,784)</b>

A: Expenses directly related to the student

B: Administrative expenses that support student learning

C: Depreciation: Capital Expense (5 yr)

D: Campus income before other income/expenses, corporate allocation and taxes

San Joaquin Valley College  
Occupational Therapy Assistant  
Financial Budget Detail

	Values	Start Up
<b>CENSUS</b>		
Beginning Census		
Starts		
Drops		
Graduates		
<b>Ending Census</b>		
<b>Revenue</b>		
Net revenue/student/dy	\$ 82	
Days earned per month		
<b>Net revenue</b>		
<b>Direct Expenses:</b>		
Salaries		<b>138,033</b>
Payroll taxes	9%	<b>12,423</b>
Text & supplies	\$ 271	-
Physicals	\$ 22	-
Lab Supplies	\$ 88	<b>19,861</b>
Cert./Licenses Exams	\$ 894	-
Library Resources		<b>1,085</b>
Consultant		<b>39,000</b>
Accreditation Fee		<b>4,390</b>
<b>Total direct expenses</b>		<b>214,792</b>
Gross profit per month		
<b>Gross profit %</b>		
Depreciation	\$ 583	<b>583</b>
Non Capital	\$ 11,360	<b>11,360</b>
Marketing		<b>50,000</b>
Administrative Support	10%	
<b>Total Expenses</b>		<b>61,944</b>
<b>Net Income</b>		
Accumulative Net Income		<b>(276,736)</b>
<b>Salaries + Benefits</b>		
OTA Program Director	\$ 8,750	<b>87,500</b>
OTA Instructor - Full Time	\$ 6,667	<b>26,667</b>
OTA Instructor - Part Time	\$ 3,000	-
OTA Field Work Coordinator	\$ 6,667	<b>10,000</b>
OTA Admin Assistant	\$ 3,467	<b>13,867</b>
<b>Total Direct Salaries</b>		<b>138,033</b>

San Joaquin Valley College  
Occupational Therapy Assistant  
Financial Budget Detail

	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	1-12 Months
<b>CENSUS</b>													
Beginning Census	-	19	18	17	17	17	17	17	17	17	36	35	
Starts	20	-	-	-	-	-	-	-	-	20	-	-	40
Drops	1	1	1	-	-	-	-	-	-	1	1	1	6
Graduates	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Ending Census</b>	<b>19</b>	<b>18</b>	<b>17</b>	<b>17</b>	<b>17</b>	<b>17</b>	<b>17</b>	<b>17</b>	<b>17</b>	<b>36</b>	<b>35</b>	<b>34</b>	
<b>Revenue</b>													
Net revenue/student/dy	\$ 1,398	\$ 1,324	\$ 1,251	\$ 1,251	\$ 1,251	\$ 1,251	\$ 1,251	\$ 1,251	\$ 1,251	\$ 2,649	\$ 2,575	2,502	
Days earned per month	26	29	31	30	31	30	31	31	30	31	30	31	
<b>Net revenue</b>	<b>36,349</b>	<b>38,409</b>	<b>38,777</b>	<b>37,526</b>	<b>38,777</b>	<b>37,526</b>	<b>38,777</b>	<b>38,777</b>	<b>37,526</b>	<b>82,115</b>	<b>77,259</b>	<b>77,553</b>	<b>\$ 579,369</b>
<b>Direct Expenses:</b>													
Salaries	32,217	32,217	32,217	32,217	32,217	32,217	32,217	32,217	40,617	35,217	35,217	35,217	\$ 404,000
Payroll taxes	2,900	2,900	2,900	2,900	2,900	2,900	2,900	2,900	3,656	3,170	3,170	3,170	\$ 36,366
Text & supplies	5,423					4,610				10,033			\$ 20,066
Physicals	414	392	370	370	370	370	370	370	370	784	762	740	\$ 5,682
Lab Supplies	1,666	1,578	1,491	1,491	1,491	1,491	1,491	1,491	1,491	3,157	3,069	2,981	\$ 22,887
Cert./Licenses Exams	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Library Resources													\$ -
Consultant													\$ -
Accreditation Fee					4,390		4,390						\$ 8,780
<b>Total direct expenses</b>	<b>42,620</b>	<b>37,087</b>	<b>36,977</b>	<b>36,977</b>	<b>41,367</b>	<b>41,587</b>	<b>41,367</b>	<b>36,977</b>	<b>46,133</b>	<b>52,360</b>	<b>42,218</b>	<b>42,108</b>	<b>497,781</b>
Gross profit per month	(6,271)	1,322	1,799	548	(2,591)	(4,061)	(2,591)	1,799	(8,608)	29,755	35,041	35,445	\$ 81,588
<b>Gross profit %</b>	<b>-17.3%</b>	<b>3.4%</b>	<b>4.6%</b>	<b>1.5%</b>	<b>-6.7%</b>	<b>-10.8%</b>	<b>-6.7%</b>	<b>4.6%</b>	<b>-22.9%</b>	<b>36.2%</b>	<b>45.4%</b>	<b>45.7%</b>	<b>14.1%</b>
Depreciation	583	583	583	583	583	583	583	583	583	583	583	583	\$ 7,000
Non Capital													\$ -
Marketing	10,000	10,000	10,000										\$ 30,000
Administrative Support	3,635	3,841	3,878	3,753	3,878	3,753	3,878	3,878	3,753	8,212	7,726	7,755	\$ 57,937
<b>Total Expenses</b>	<b>14,218</b>	<b>14,424</b>	<b>14,461</b>	<b>4,336</b>	<b>4,461</b>	<b>4,336</b>	<b>4,461</b>	<b>4,461</b>	<b>4,336</b>	<b>8,795</b>	<b>8,309</b>	<b>8,339</b>	<b>94,937</b>
<b>Net Income</b>	<b>(20,489)</b>	<b>(13,102)</b>	<b>(12,662)</b>	<b>(3,788)</b>	<b>(7,052)</b>	<b>(8,397)</b>	<b>(7,052)</b>	<b>(2,662)</b>	<b>(12,944)</b>	<b>20,960</b>	<b>26,732</b>	<b>27,106</b>	<b>\$ (13,348)</b>
Accumulative Net Income	(297,225)	(310,327)	(322,989)	(326,776)	(333,828)	(342,226)	(349,277)	(351,939)	(364,883)	(343,922)	(317,190)	(290,084)	
<b>Salaries + Benefits</b>													
OTA Program Director	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	\$ 105,000
OTA Instructor - Full Time	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	\$ 160,000
OTA Instructor - Part Time	-	-	-	-	-	-	-	-	8,400	3,000	3,000	3,000	\$ 17,400
OTA Field Work Coordinator	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	\$ 80,000
OTA Admin Assistant	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	\$ 41,600
<b>Total Direct Salaries</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>40,617</b>	<b>35,217</b>	<b>35,217</b>	<b>35,217</b>	<b>404,000</b>

San Joaquin Valley College  
Occupational Therapy Assistant  
Financial Budget Detail

	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	13-24 Months
<b>CENSUS</b>													
Beginning Census	34	34	34	34	34	34	34	34	36	35	34	34	
Starts	-	-	-	-	-	-	-	20	-	-	-	-	20
Drops	-	-	-	-	-	-	-	1	1	1	-	-	3
Graduates	-	-	-	-	-	-	-	17	-	-	-	-	17
<b>Ending Census</b>	<b>34</b>	<b>34</b>	<b>34</b>	<b>34</b>	<b>34</b>	<b>34</b>	<b>34</b>	<b>36</b>	<b>35</b>	<b>34</b>	<b>34</b>	<b>34</b>	
<b>Revenue</b>													
Net revenue/student/dy	\$ 2,502	\$ 2,502	\$ 2,502	\$ 2,502	\$ 2,502	\$ 2,502	\$ 2,502	\$ 2,649	\$ 2,575	\$ 2,502	\$ 2,502	\$ 2,502	
Days earned per month	31	28	31	30	31	30	31	31	30	31	30	31	
<b>Net revenue</b>	<b>77,553</b>	<b>70,048</b>	<b>77,553</b>	<b>75,052</b>	<b>77,553</b>	<b>75,052</b>	<b>77,553</b>	<b>82,115</b>	<b>77,259</b>	<b>77,553</b>	<b>75,052</b>	<b>77,553</b>	<b>\$ 919,898</b>
<b>Direct Expenses:</b>													
Salaries	35,217	35,217	35,217	32,217	32,217	32,217	32,217	35,217	35,217	35,217	35,217	35,217	\$ 410,600
Payroll taxes	3,170	3,170	3,170	2,900	2,900	2,900	2,900	3,170	3,170	3,170	3,170	3,170	\$ 36,960
Text & supplies			9,219					14,643					\$ 23,862
Physicals	740	740	740	740	740	740	740	784	762	740	740	740	\$ 8,947
Lab Supplies	2,981	2,981	2,981	2,981	2,981	2,981	2,981	3,157	3,069	2,981	2,981	2,981	\$ 36,041
Cert./Licenses Exams	-	-	-	-	-	-	-	15,198	-	-	-	-	\$ 15,198
Library Resources													\$ -
Consultant													\$ -
Accreditation Fee	4,000												\$ 4,000
<b>Total direct expenses</b>	<b>46,108</b>	<b>42,108</b>	<b>51,328</b>	<b>38,838</b>	<b>38,838</b>	<b>38,838</b>	<b>38,838</b>	<b>72,168</b>	<b>42,218</b>	<b>42,108</b>	<b>42,108</b>	<b>42,108</b>	<b>535,608</b>
Gross profit per month	31,445	27,940	26,226	36,213	38,715	36,213	38,715	9,948	35,041	35,445	32,943	35,445	\$ 384,290
<b>Gross profit %</b>	<b>40.5%</b>	<b>39.9%</b>	<b>33.8%</b>	<b>48.3%</b>	<b>49.9%</b>	<b>48.3%</b>	<b>49.9%</b>	<b>12.1%</b>	<b>45.4%</b>	<b>45.7%</b>	<b>43.9%</b>	<b>45.7%</b>	<b>41.8%</b>
Depreciation	583	583	583	583	583	583	583	583	583	583	583	583	\$ 7,000
Non Capital													\$ -
Marketing													\$ -
Administrative Support	7,755	7,005	7,755	7,505	7,755	7,505	7,755	8,212	7,726	7,755	7,505	7,755	\$ 91,990
<b>Total Expenses</b>	<b>8,339</b>	<b>7,588</b>	<b>8,339</b>	<b>8,088</b>	<b>8,339</b>	<b>8,088</b>	<b>8,339</b>	<b>8,795</b>	<b>8,309</b>	<b>8,339</b>	<b>8,088</b>	<b>8,339</b>	<b>98,990</b>
<b>Net Income</b>	<b>23,106</b>	<b>20,352</b>	<b>17,887</b>	<b>28,125</b>	<b>30,376</b>	<b>28,125</b>	<b>30,376</b>	<b>1,153</b>	<b>26,732</b>	<b>27,106</b>	<b>24,855</b>	<b>27,106</b>	<b>285,300</b>
Accumulative Net Income	(266,978)	(246,626)	(228,739)	(200,614)	(170,238)	(142,113)	(111,736)	(110,584)	(83,852)	(56,745)	(31,890)	(4,784)	
<b>Salaries + Benefits</b>													
OTA Program Director	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	\$ 105,000
OTA Instructor - Full Time	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	13,333	\$ 160,000
OTA Instructor - Part Time	3,000	3,000	3,000	-	-	-	-	3,000	3,000	3,000	3,000	3,000	\$ 24,000
OTA Field Work Coordinator	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	6,667	\$ 80,000
OTA Admin Assistant	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	\$ 41,600
<b>Total Direct Salaries</b>	<b>35,217</b>	<b>35,217</b>	<b>35,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>32,217</b>	<b>35,217</b>	<b>35,217</b>	<b>35,217</b>	<b>35,217</b>	<b>35,217</b>	<b>410,600</b>

## Appendix G: Accreditation and Approvals Timeline

