Balanced Heart™ Healing Center

Business Plan

August 2009
Introduction

The inspiration for the Balanced Heart™ Healing Center (Balanced Heart™) was the realization by its founder, Katie McCorkle, PhD, that there are abundant health care resources in the United States, but the mechanisms by which they are applied and distributed results in inadequate care for too many. An initial desire to connect those with the inclination to share their gifts freely and those in need has evolved into a comprehensive plan for an integrative healing community which will provide access to a wide range of traditional, complementary, alternative and educational approaches. Health and wellness will be emphasized as well as the importance of taking responsibility for one’s own health and well being. Balanced Heart™ is committed to serving all who want our services, regardless of insurance or ability to pay.

Since she opened her private psychology practice in 1997, Dr. McCorkle has treated people unconditionally (regardless of their insurance status or ability to pay), and never turned anyone away for any reason. Because of her belief that all people deserve affordable access to holistic health care, and her awareness that many health care providers have gifts they wish to share with others unconditionally, she has set out to expand her practice to include many others in various disciplines and establish a new healing community.

Balanced Heart™ Healing Center, Inc. is a 501 (c) (3) non-profit organization based in metropolitan Pittsburgh, Pennsylvania, and targets its services to individuals in the ten-county Southwestern Pennsylvania region.

I. A New Health Care Approach

Health care in the United States is in crisis. On a per capita basis, America spends far more than any other country on health care, but ranks 45th in life expectancy and 42nd in infant mortality. Nearly 20% of the population (46 million people) does not have health insurance. Additionally, the cost of employer provided health insurance increased three times faster than inflation over the past 10 years.

Traditional medicine’s focus on the treatment of disease, and its ever increasing emphasis upon specialization, technology, and medication, has contributed significantly to the crisis. We overvalue specialization at the expense of the whole. There is an overreliance on medication when changes in lifestyle choices and nutritional habits could achieve similar or better results. We now have a health care culture which puts insufficient emphasis on wellness and prevention, considers health only when something is “wrong”, and allows individuals to disregard responsibility for their own health.
In response to the shortcomings in the way medicine has been practiced until now, the public and health care providers increasingly have supported new approaches and options, in particular complementary and alternative medicine (CAM), and integrative medicine. CAM is a group of diverse medical and health care systems, practices, and products that are not generally considered to be part of conventional medicine. Broad categories of complementary and alternative medicine include, but are not limited to:

- **Healing systems** such as Ayurveda, Homeopathy, Naturopathy and ancient medicines (such as Chinese, Tibetan or American Indian practices)
- **Mind-body therapies** including meditation, yoga, biofeedback, prayer, hypnosis, relaxation techniques, and creative arts therapies (such as music or dance)
- **Manipulation and touch** (Chiropractic, massage, acupressure)
- **Energy therapies** (Acupuncture, Therapeutic touch, and Reiki)

Basic philosophies of complementary and alternative medicine include:

- Prevention is key to good health
- Your body has the ability to heal itself
- Learning, self-awareness, and healing go hand in hand
- Holistic (whole person, integrated mind/body/spirit) care

A study by the National Institutes of Health found that 38% of adults use some form of complementary and alternative medicine (CAM). When megavitamin therapy and prayer are included as part of CAM the figure jumps to 62%. This high acceptance and use of CAM is despite the fact that it is not usually covered by insurance plans. Integrative medicine is a new approach to medical care that combines treatments from conventional medicine and CAM for which there is scientific evidence of safety and effectiveness. Integrative Medicine also strives to bring client and practitioner together in a dynamic partnership dedicated to optimizing the client's health and healing. This approach focuses on the whole person, recognizing that the subtle interactions of mind, body, spirit and community have a direct impact on vitality and well-being. In a 2005 survey by the American Hospital Association (AHA), 27% of responding hospitals said they offered at least one type of CAM to patients, up from 8% in 1998. The Consortium of Academic Health Centers for Integrative Medicine, whose goal is to is to make a qualitative difference in people’s health by advocating an integrative model of healthcare, incorporating mind, body and spirit, counts among its members 38 leading American medical schools, including Johns Hopkins, Harvard, the University of Pennsylvania, Stanford, Duke and Yale.
CAM and Integrative Medicine can be a significant part of the solution to the current health care crisis. The impact can be inferred readily from the benefits of an integrative medical approach which includes:

- Supporting the body’s natural ability to heal itself
- Reducing stress, and promoting a state of relaxation or “flow”
- Decreasing Pain (psychological, as well as physical)
- Reducing sleep problems
- Preventing many chronic diseases
- Enhancing immune system function
- Decreasing infections
- Lowering blood pressure, cholesterol and glucose levels
- Improving bowel function
- Lessening anxiety or depression related to being ill

Numerous studies of wellness programs implemented by employers and insurance companies resulted in paybacks ranging from 2 to 4 times the cost of the program while simultaneously showing improvements in participant health and satisfaction. Stress has a major impact on physical and psychological health. It’s been suggested that 70 to 90% of doctor’s visits are for symptoms that are at least partially stress related. Medical conditions influenced by persistent stress include diabetes, hyperthyroidism, obesity, ulcers, heart disease, and cancer.

Clearly, there is a trend to higher acceptance of CAM and an appreciation of the value of an integrative approach to health care. Nonetheless, new ventures utilizing this approach have been pursued in a very measured manner. The vast majority of CAM usage by hospitals tends to focus on traditional health education, and chronic conditions, relying upon a narrow range of empirically validated treatments.

Insurance coverage remains a major impediment to further CAM usage. Even when insurance does cover CAM treatments, the reimbursement rates are so low and the billing issues so problematic that most providers require payment in full, and allow the client to pursue insurance reimbursement.

The issues related to insurance coverage and the restrained approach of the medical establishment create an opportunity for a health care organization which embraces a wide range of evidence based complementary and alternative treatments, and a business model which accommodates the under-insured and uninsured.
II. The Balanced Heart™ Healing Center

Balanced Heart™ Healing Center (Balanced Heart™) is envisioned to be an integrated traditional and holistic health clinic and healing network providing unlimited and unconditional access to a wide range of health care providers and services. The caregivers (psychologists, medical doctors, massage therapists, nutritionists, counselors, chiropractors, and others) will be members of a network of providers operating from a shared value base. BHHC [Dave, do you want to use Balanced Heart™ or BHHC as the abbreviation?] intends to make health care and wellness education easily accessible to individuals and communities in a flexible way, allowing for programs to change as needs change. Services offered in local facilities such as businesses, faith communities, schools, health clubs, and private offices will bring improved health and education within easy reach of those in need.

The unique Balanced Heart™ clinical model and service approach is based on a holistic treatment model developed and practiced by Dr. Katie McCorkle with more than 700 individuals over seven years of development and clinical use. The model is known as Balance Point Therapy™ (or Balanced Heart™ Coaching?), an integrated program for psychological and spiritual growth. Balance Point Therapy™ builds upon humanistic and transpersonal psychology by offering cognitive-behavioral tools and strategies for facilitating both psychological and spiritual growth, according to each person’s own belief system and experience. It teaches clients tools and strategies for deepening their self-awareness and releasing negative thought and behavior patterns, so they can live their lives at a higher functional level, in greater consistency with whatever their spiritual beliefs may be. At the heart of Balance Point Therapy™ are 10 Principles, which also form the shared value base for Balanced Heart™ Healing Center. They are:

1. Open your heart and trust
2. Give and receive freely, without attachment to the outcome
3. Create safety for yourself and others
4. Welcome everything as a blessing, especially when it doesn’t look like one
5. See only goodness (Love)
6. Dream BIG!
7. Take responsibility for everything, no exceptions
8. Let Go of what no longer serves you
9. Have no judgments, so the truth can be revealed
10. Be the miracle you want to create!

The 10 Principles are universal and equally effective with people of all religious belief systems… or none at all.

BHHC will accept payments from commercial and government insurance providers. Clients without insurance, or whose insurance does not pay for the service provided, will
be asked to pay a fee they determine to be affordable for the treatment received. We expect that this fee structure will enable underserved populations to obtain much-needed health care services. The populations BHHC intends to target include those wanting CAM treatments and integrative health care, under-insured and uninsured people, veterans, disempowered women and minorities, children, troubled teens, those living in rural or underserved areas, and those with chronic illnesses which are exacerbated by stress and unhealthy lifestyle choices. Services will be provided throughout the Pittsburgh region, as service provided to the more affluent areas will help support those provided in less prosperous areas.

The Balanced Heart™ business model is multi-faceted, highly integrated, and financially sustainable. Grounded in the 10 Principles™, the model offers providers considerable flexibility in how they may contribute to Balanced Heart™ Healing Center’s mission and viability. The major components of the business model are outlined as follows:

**Healing-Donors**

Healing-Donors are independently licensed health care providers, working out of their own office space, who are interested in an uncomplicated means to donate their services to the common good. They will agree to provide their donated services in a manner consistent with Balanced Heart’s™ 10 Principles and commitment to unconditional care, and BHHC will provide administrative support, and insurance billing for donated services. Healing-Donors will be able to claim an income tax deduction for the revenue received by BHHC for their donated services.

**Healing-Partners**

Healing-Partners are Independent Contractors working in the BHHC clinic. They set their own fees in their for-profit practice, and agree to treat unconditionally those BHHC clients who may not be able to pay their usual fees. Healing-Partners will pay a fee for clinic space, and for administrative and marketing support.

Healing-Partners who are independently licensed by the state will complete, at a minimum, the Basic Training in Balance Point Therapy™. Healing-Partners who are certified in healing modalities which are not currently licensed by the state will undergo a credentialing process appropriate to their discipline, and complete their certification as Balance Point Therapy™ Coaches. For both licensed and unlicensed Healing-Partners (and clinic staff), advanced Balance Point Therapy™ training will be offered at no charge.
Students

BHHC will utilize the services of students as healers-in-training (under appropriate supervision) to provide unconditional care as well. The center will facilitate supervisory relationships between Healing-Partners and students as they provide services to BHHC clients. Over the past three years, Dr. McCorkle has supervised graduate students from Indiana University of Pennsylvania, and she will supervise a Carlow University intern during the 2009-2010 academic year. Arrangements to accept interns from the University of Pittsburgh’s School of Social Work are in process.

Visiting Teachers

Visiting Teachers will be invited to train BHHC Healing-Partners, clinic staff, Healing-Donors, and the general public in cutting-edge healing modalities, environmental practices, and wellness advocacy. The visiting Teacher either will pay a fee to BHHC for workshop space, administrative and marketing support, or will receive a training fee from BHHC, or will donate their services to the common good and receive a tax deduction.

Training and Certification Program

To ensure that clients are treated in a consistent manner by BHHC’s network of providers, a Balance Point Therapy™ training and Balanced Heart™ Coach certification program has been developed. The Basic Training comprises four classes taken over a one year period. It is a required prerequisite for practitioners wishing to become part of the BHHC network of providers (Healing-Partners). Healing-Donors are encouraged, but not required, to obtain this Basic Training. Certification as a Balance Point Therapy™ Coach will require an additional year of classes, and a minimum of 750 hours of supervised practice. Those people wishing to become Balance Point Therapy™ or Balanced Heart™ Coach Trainers will undergo a third year of training and supervision.
**Healing Community**

To fulfill its mission of assisting individuals to live happy, healthy and meaningful lives, BHHC will in the future transform itself from a small holistic clinic to a multi-faceted, financially and spiritually self-sustaining, healing community, which will include a wide range of facilities such as:

- Horse barn and equine assisted therapy
- Drumming circle/firepit
- Outdoor amphitheatre
- Retreat center
- Performing & visual arts facility
- Yoga, dance & meditation studio
- Sound healing center
- Media Center
- Spa
- School (k-12)
- Greenhouse
- Small Hospital
- Environmental Center

A variety of educational resources will be offered including web-based instruction, books, seminars and retreats. The long-term goal is that Balanced Heart™ Healing Center will become a center of community healing, educational, creative, spiritual, and recreational activity. It will be a site for personal retreat; a media center promoting mass healing and “greening”; and a place for learning about and connecting with the legacy of the Native American past as we create new structures and patterns of interaction for our society’s future.
III. Implementation Plan

Current Status

Balanced Heart Healing Center™ currently operates a holistic mental health clinic in Dr. McCorkle’s office in Warrendale, PA. It has one therapy office and group room. Balanced Heart™ Healing Center is in the early stages of collecting survey data on the efficacy of Balance Point Therapy™ both with providers undergoing Balance Point Therapy™ training and with consumers. Dr. McCorkle’s recent credentialing with Community Care Behavioral Health Organization will provide access to funding for Allegheny County residents with Medicaid, disability, and Medicare health insurance, as well as those insured by UPMC.

During the winter of 2009, 12 physicians, mental health professionals, and holistic healers began training in Balance Point Therapy™. The number of practitioners who have already expressed a strong interest in becoming Healing-Donors and Healing-Partners is nearly sufficient to enable the clinic to become financially self-supporting within 18 months. Recruitment of Healing-Partners, Healing-Donors and students will be an ongoing activity. A graduate student in Counseling at Carlow University will begin internship training at Balanced Heart™ Healing Center in September 2009, and we are currently pursuing affiliation with the University of Pittsburgh’s School of Social Work.

Until funding for space adequate to meet state licensing requirements is secured, Balanced Heart™ Healing Center intends to continue operating as a network of Healing-Donors and Healing-Partners in the office space currently utilized by each provider or by businesses and community agencies partnering with BHHC.

Marketing and fundraising plans are also being prepared. A logo was recently created and we are in the process of developing informational and marketing materials such as a website (www.balancedheart.org) and brochures. BHHC will pursue a variety of fundraising opportunities including promotional events, web-based efforts, and the generosity of individual donors. Nonetheless, we anticipate that the bulk of our start-up funding will come from high net worth individuals and/or foundations.

Clinic Offices

The current goal is to open new offices for the clinic by the autumn of 2009. The offices will support administrative functions, and a handful of treatment offices. Having such a facility is also part of the requirement for a Pennsylvania mental health clinic license. Proposals are currently being developed to secure funding for office space and to pay for related start-up costs.
Scheduling and billing activities will be kept in-house due to their criticality and the complexity of BHHC’s provider network and range of treatments. It is expected that services for a medical record system that meets Medicaid standards can be contracted.

**Evolution to a Healing Community**

Balanced Heart™ Healing Center’s evolution from a small clinic into a fully-functioning healing community will require an expanding network of both localized and virtual collaborations with a wide variety of partners and donors who share our vision of building healthy, holistic communities which are both financially and spiritually sustainable. We will endeavor to collaborate with local businesses and entrepreneurs, government entities, creative artists and educators, environmental and conservation groups, and hospitals and health insurers who support the idea of a vibrant and sustainable holistic community.

Significant fundraising will be essential in order to finance the land and buildings for our headquarters campus. This will take many forms including promotional events, partner contributions, grant writing, online solicitations, and approaching individual donors. We anticipate raising $75-125 million over the next five years.

People will be able to connect with our community and our work in as committed or as limited a way as they wish. Some will live and work on campus, or come from afar for a year or two to learn our methods and then seed them elsewhere. Others will have a business on campus, utilize our facilities, or connect with us online. Many will come for treatments, seminars and educational events, spa services, or to enjoy the peace and beauty of our grounds. All are welcomed to join us in learning to live the 10 Principles ever more consistently in our daily lives and in our work.
**Financial Plan**

The table on page 11 contains an 18 month financial plan for BHHC. The numbers of service providers is based on interest shown by a wide variety of providers in becoming part of the BHHC network, including current participants in BPT™ training. The number of hours each provider allocates to BHHC is believed to be conservative as are the average fees. Provision has also been made for services provided to those without the ability to pay.

We expect that the clinic will become financially self-sustaining within 16-18 months. The primary risk is how quickly Healing-Donors and Healing-Partners are added to BHHC’s provider network. Operating costs and overhead will be kept to the minimum required to establish the clinic and receive necessary accreditations.

For simplicity, the financial plan reflects a cash basis so that changes in net assets directly equate to cash consumed or generated. Office space and office equipment will be leased. The major investments needed to establish the clinic will be for a scheduling and billing system (estimated at $25,000), administrative staffing, and furnishings (estimated at $50,000).

To launch the clinic, BHHC will seek funding from a variety of sources for $150-$200,000.
Balance Heart Healing Center

18 Month Financial Plan

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<td>Net Assets Increase/(Decrease)</td>
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<td>$ (6.1)</td>
<td>$ (5.4)</td>
<td>$ (3.2)</td>
<td>$ (2.6)</td>
<td>$ (2.0)</td>
<td>$ (4.1)</td>
<td>$ (3.9)</td>
<td>$ (2.8)</td>
<td>$ (2.0)</td>
<td>$ (1.3)</td>
<td>$ (0.7)</td>
<td>$ (0.1)</td>
<td>$ 0.6</td>
<td>$ (162.8)</td>
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IV. Organization & Governance

Committed to both financial and spiritual sustainability (balanced and loving relationships), Balanced Heart™ Healing Center’s core values are honesty, openness, service, equality, safety, integrity, respect, freedom, acceptance without judgment, and consistency between thought/word/deed in a life lived. The experience of love, joy, peace, and integrity, as tested in community, is the standard to which we aspire.

Integrating the spiritual and the secular in everyday life, and building upon Dr. McCorkle’s roots in the Religious Society of the Friends of Truth (Quakers) and their way of conducting business in an egalitarian and spiritually-centered manner, Balanced Heart™ Healing Center has from the beginning conducted its business in a similar fashion. Financial sustainability is not enough; it is equally important to be spiritually sustainable as well. In clarity of mind, heart, and intention, the Balanced Heart™ Healing Center board acts in unity of spirit. Together, the board looks to a spiritual source for the inspiration to take action. Until the assembled group is clearly led, no action is taken. Embracing differences in a spirit of appreciation for the greater unity to which they open the way, each person assumes equal responsibility for all decisions. As an organization, we conduct our business with other organizations in a similar fashion, as a way of working towards mutual sustainability and respect. It is by this voteless discernment process, in which business is conducted as an act of love (for both self and other), that each level of the organization is self-governing…. board, management team, staff, and Healing-Partners alike.

Those currently serving on the BHHC Board of Trustees include:

- Dubravka Bencic, Clerk
- Katharine McCorkle, PhD, Founder
- Janet McKee, HHC, AADP, MBA, Treasurer
- Cynthia Miller
- Randy Peters, MD, Secretary

The Advisory Board is comprised of people from various segments of the community at large. Those currently serving on the Advisory Board include:

- Paul Beran is President of Advertel, a media and telephone advertising firm. He has offered to assist with marketing by developing and hosting BHHC’s website.
- Esther Dormer is a principal in the Future Fund (venture capital firm), and the developer of a unique, earth-friendly system of real estate development. She brings financial, business planning, and real estate development expertise to the Advisory Board.
- Robert McCormick, MBA is a Partner and Vice-President at Global Management, LLC. An architectural engineer with 35 years experience in the chemical and manufacturing industries, he brings to the Advisory Board a wealth of experience in all aspects of project execution, including engineering management, construction management, procurement, detail design and start-up.
- David Parker, EdD is an educational consultant, trainer, and entertainer with an international reputation. He is an expert in developing a positive educational climate in schools.
Joe Roberts, PhD, LCSW is an Assistant Professor of Psychology at Carlow University. He is collaborating on research, advising on grant writing, and directing holistic-minded graduate students toward existing practicum and internship opportunities afforded by BHHC.

Diane Wuycheck is a Public Relations Consultant with 25 years experience in the healthcare industry. She has managed media relations and corporate communications for Highmark and UPMC, as well as many other clients, and brings a wealth of expertise in communications, marketing, strategic planning, and administration to the Advisory Board.

Management Team

BHHC currently has a Management Team comprised of three volunteers; their resumes are contained in the appendix at the end of the plan.

- **Katharine McCorkle, CEO** – Katie is providing the leadership required to make BHHC a reality. Katie is also BHHC’s Chief Healing Officer with the added responsibilities to recruit and screen potential Healing-Partners and Healing-Donors, formulate of all appropriate treatment related policies, and to ensure all clients are treated in accordance with the 10 principles.

- **David Frimpter, Manager of Finance and Planning** – Dave has assisted in the preparation of the business plan and will continue to assist in the development of detailed implementation plans and the formulation of management and financial policies and procedures.

- **Baya Boes, Operations Manager** – Baya will be responsible for the recruitment of administrative staff, formulation of administrative policies and procedures, and the selection and implementation of administrative systems.

An Office Manager will be hired to handle day to day scheduling and billing activities when the new clinic office is established.
IV. Expected Benefits

In the short term, the major benefits from BHHC’s programs will be:

- lower (mental/physical/spiritual) stress,
- increased well-being, and
- improved access to holistic health services for BHHC’s clients and providers.

Over time, these benefits will translate into:

- improved physical health at a lower cost to society,
- more passionate and productive living, and
- reduced impact of chronic conditions.

Anticipated benefits extend from individual, to family and work group, to community well-being. Balanced Heart™ Healing Center will benefit children, adults, and retirees. It will provide an expanded range of healthcare options, a model for environmental awareness, and support for an ailing economy. Balanced Heart™ Healing Center represents a way of living in health and harmony, freedom and security, focused upon strength-based growth, and preventing or mitigating the need for services and programs which have been most burdensome to society and to the economy.

The physical and economic burden of chronic health conditions will be reduced by treatment, and by prevention based upon educational efforts, resulting in lower costs to individuals, insurers, and society. Businesses will then have healthier, less stressed, and more productive employees improving their bottom line and reducing the cost of health care insurance. This will allow government to focus its resources upon caring for the neediest people.

People wishing to share their gifts and expand their businesses as part of a healthy, growing, and sustainable community will have opportunities to do so. In this context, educating young children (and their parents) about how to live healthy, harmonious, and hopeful lives free of fear and negative thinking will be of primary importance. Where in the past, the “sins of the father” have been passed down to all, through the Balanced Heart™ model, the gifts of the young and the young-at-heart will be shared freely with all.
Appendix

Management Team Resumes
EDUCATION
1991 Univ. of Pittsburgh, PA – PhD in Counseling Psychology – APA Approved Program
1985 Univ. of Pittsburgh, PA – MSW in Clinical Work with Children & Adolescents
1972 Stanford Univ., CA – AB in Psychology

EMPLOYMENT HISTORY
Academic:
Balance Point Therapy Training Institute, Mars, PA 01/07-present
Founder, and Developer of Balance Point Therapy™, a spiritually-centered form of cognitive-behavioral treatment based upon 10 Principles for releasing attachments, and freeing oneself to love both self and others unconditionally.

Community College of Allegheny County, McKeesport, PA 3/04
Instructor – Course in Stress Management. During the course, students encountered an armed man in a police action, and debriefed the incident in class.

University of Pittsburgh, Institute for the Black Family, Pittsburgh, PA 1/95-7/95
Research Associate – Conduct national and local surveys, write grant proposals, collaborate in developing new graduate program in Africana Family Studies, collaborate on development of values-based curriculum.

Medical College of Pennsylvania, Pittsburgh, PA 10/93- 1/95
Adjunct Instructor, Division of Psychology, Department of Psychiatry – Teach seminars in APA approved psychology internship program.

Harvard Medical School, Boston, MA 9/90-8/91
Clinical Fellow in Psychology, Department of Psychiatry

University of Pittsburgh, Pittsburgh, PA 1/90-4/90
Teaching Assistant for Jerome Taylor, PhD – Social Psychology course

Pennsylvania State University, State College, PA 11/76-4/80
Part-time Instructor – Teach courses in Developmental Education and Drug and Alcohol Abuse in Continuing Education Department of the College of Education.

Non-Academic:
Balanced Heart Healing Center™, Inc., Mars, PA 6/06-present
Founder, and CEO of a 501(c)(3) non-profit healing center whose mission is to expand access to a comprehensive range of traditional and holistic health care and education opportunities to all people unconditionally through a “healing center without walls”. Affiliated with Indiana University of PA.
Private Practice, Mars, PA  4/97-present
Psychologist in independent practice –adult, child, and family therapy, reconciliation services, organizational consultation, psycho-educational seminars, retreats and classes on various topics, media outreach (radio/TV/print).

Vericare (formerly Senior Psychology Services), Pittsburgh, PA  8/00-9/02, 7/04-8/04
Psychologist – Provided assessment and psychological services to patients in nursing homes and assisted living facilities. Coordinated care plans with the facilities, and provided training to their staff.

Pittsburgh Black Action (P.B.A., Inc.), Pittsburgh, PA  11/95-4/97
Director of Social Services – supervised mental health clinic in a comprehensive methadone treatment program for opiate addicts, reorganized department of 15 counselors, wrote grants and coordinated agency participation in multi-agency research project, provided in-service training to staff.

Veterans’ Administration Hospital-Oakland, Pittsburgh, PA  6/95-11/95
Consulting Psychologist – Psychological consultations, short-term psychotherapy and group therapy for veterans and their families.

Allegheny General Hospital, Pittsburgh, PA  1/92-10/93
Pediatric Neuropsychologist – Neuropsychological assessments of children, adolescents, and young adults. Taught seminars in APA Approved internship.

Children’s Hospital/Judge Baker Children’s Center, Boston, MA  9/90-8/91
Intern in Clinical & Pediatric Psychology, APA Approved program with 12 mo. rotations in Individual Outpatient Psychotherapy, Forensic Assessment (custody, parental fitness, bonding studies, etc.), Family Therapy Team, and Consultation/Liason to Gastrointestinal Clinic. Six month rotations in Neuropsychological Assessment and Personality and Intellectual Assessment

Allegheny East MH/MR Center, Pittsburgh, PA  6/89-3/90
Practicum Student – Individual psychodynamic psychotherapy and psychodiagnostic testing with adult outpatients, group therapy with day hospital patient. Participation in weekly clinical meetings and interdisciplinary staffings.

Allegheny General Hospital, Pittsburgh, PA  6/89-8/89
Practicum student – Neuropsychological testing with medical and psychiatric inpatients, referred outpatients. Age range: 12 to 80. Diagnoses included seizure disorders, spina bifida, head trauma, ADD, dementia, depression,stroke.

Youth Development Center, New Castle, PA  1/82-6/89
Psychological Services Associate II – All facets of individual and group assessment and treatment with delinquent adolescents. Consultation and in-service training for staff. Participated in the development of a cognitive-behavioral inpatient program for teenaged sex offenders. Developed a funded grant for a multi-agency project serving learning disabled students.
University of Pittsburgh Counseling Center, Pittsburgh, PA 5/88-12/88
Practicum student – Individual psychodynamic therapy and projective testing with university students and staff. Individual and group career counseling.

Western Psychiatric Institute and Clinic, Pittsburgh, PA 1/85-4/85
Practicum student – Individual psychodynamic drama therapy.

Pittsburgh Action Against Rape (PAAR), Pittsburgh, PA 6/84-1/85
Practicum student – Individual play therapy with child survivors of sexual assault, individual and group therapy with parents and adult survivors, crisis intervention. Consultation with community agencies.

Sewickley Valley Hospital, Sewickley, PA 1/84-8/84
Practicum student – Individual play therapy and family therapy with children, teens and parents. Took developmental histories and made assessments.

Prevention Project of Beaver County, Monaca, PA 2/82-6/82
Consultant – Developed 10 week training program for staff at the Women’s Shelter of Lawrence County. Topics included dynamics of spousal abuse and its impact upon children in the family, active listening, assertiveness, conflict resolution, service planning, and advocacy.

Lawrence County Council on Chemical Abuse, New Castle, PA 6/76-4/81
Clinical Supervisor – Outpatient substance abuse clinic and a screening/psycho-educational program for drivers convicted of DUI. Individual and family therapy. Instructor for the DUI program, wrote and monitored two grants. Supervised 5 staff as well as student interns with the agency.

MEMBERSHIP IN PROFESSIONAL SOCIETIES
American Psychological Association (APA)
Association for Comprehensive Energy Psychology (ACEP)
Pennsylvania Psychological Association (PPA)
Greater Pittsburgh Psychological Association (GPPA)
  • Chair of Continuing Education Committee 12/05-6/07

LICENSES and CERTIFICATIONS
1993- Licensed Psychologist – PA license #PS-6802L (license eligible in all 50 states)
1984- PA Certified Rape Crisis Counselor
1976- Parent Effectiveness Training Instructor
1996-7 and 2005- present: Certified Rational Addictions Therapist
2006- Master Clinical Chaplain Diplomat – United Association of Christian Counselors and Chaplains International
Trained Mediator through Pittsburgh Mediation Center

PROFESSIONAL PRESENTATIONS:
6/04 – “Serving the Underserved: Outreach in the Media” - PA Psychological Association Annual Conference, Pittsburgh, PA
PUBLICATIONS:

Audio Products:
- “Touch Your Love” (2003-CD teaching how to live 10 Principles for healthy relationships)
- “Get a Life with Dr. Katie” daily radio vignette series offering practical wisdom regarding the spirituality of relationships.
- Pilot for “Second Wind” radio show to support divorced/separated people and those who love them.

Books: A Balanced Heart: 10 weeks of success (soon to be published)
David E. Frimpter

113 Bayberry Dr.    Sarver, PA 16055    724-448-0601    dfrimpter@live.com

SUMMARY

Former senior-level executive who is using his skills, experience and business acumen to enhance the effectiveness of nonprofits in the pursuit of their mission. Uniquely skilled at providing creative solutions to complex problems enhancing organizational effectiveness. Proven team leader with unique ability to develop and motivate teams achieving business objectives in demanding environments. Areas of expertise include:

- Financial Management
- Operational & Strategic Planning
- Change Management
- Operations Analysis
- Organizational Simplification
- Process Improvement

SELECTED ACCOMPLISHMENTS

- Reviewed operating unit budgets and forecasts and investigated unfavorable performance variances.
- Performed detailed audit of project controls for report to Audit Committee of the Board of Directors.
- Reviewed significant sales proposals and capital requests; provided recommendations to executive management.
- Implemented new financial reporting and performance monitoring processes.
- Converted acquired operations to ABB financial reporting systems and procedures.
- Reduced costs by $400,000 by sensitively reorganizing and reducing administrative staff.
- Reviewed proposed investments in power projects for reasonableness of projections and balance sheet impact.
- Provided analytical support and performed financial due diligence for several acquisitions.
- Led development of Technology and IT strategies.
- Developed plan to reduce staffing by 30%, producing $4 million savings, while maintaining core competencies.
- Valued trademarks and technology to support global tax management.
- Implemented structure for global technology management.
- Instrumental in favorable resolution of $100 million Mexican venture in which ABB had a 25% interest.

EDUCATION

MBA, Finance, New York University, New York, NY
BS, Economics & Business, Hofstra University, Hempstead, NY

PROFESSIONAL EXPERIENCE

ABB UTILITY AUTOMATION, Natrona Heights, PA 2002 – 2008
Vice President Rotating Machinery & Condition Monitoring
General Manager for ABB’s turbine automation and vibration based condition monitoring businesses in the US.

ABB UTILITY AUTOMATION, Wickliffe OH 1999 – 2002
Vice President, Finance and Control, Utilities Group
Controller for newly formed division comprised of eight autonomous units.

Responsible for all administrative functions for a $30 million research laboratory, including control, technology planning, and environmental compliance.

ABB BOILER SYSTEMS & SERVICES BUSINESS AREA, Windsor, CT 1990 – 1996
Vice President, Control and Strategic Analysis 1996 – 1997
Strategic Planner and Divisional Controller for ABB’s six industrial boiler businesses.

ABB COMBUSTION ENGINEERING INC., Stamford, CT 1980 – 1990
Manager, Operations Analysis and Forecasting 1987 – 1990
Analyzed operating unit budgets, forecasts and ongoing financial performance.

Manager, Strategy Development 1980 – 1986
Managed Combustion Engineering’s strategic planning process.
EXPERIENCE

Balanced Heart Healing Center, Dec 2008-present – part time
Management Consultant

A newly formed not-for-profit. Assisting the Director with process to begin operations based on vision, mission and by-laws. Creating timelines, budgets, fundraising strategies, office setup and procedures and assisting with Board related issues.

Associate Director

A not-for-profit affiliated with Cornell University supporting peace, social justice and sustainability. I assisted with programming in our core group. CRESP sponsors 18 projects headed by coordinators. I assisted the director in bringing on new projects, training the coordinators, monitoring their programming and assisting them in growing their projects. Performed all the functions of human resource, payroll, accounts payable, accounts receivable and general ledger. I am the Board of Director’s liaison for our project Seeds of Simplicity. Attended all Board meetings to report financials and assist with programming.

Humanity’s Team, 2003-2006 – part time
Controller

Completed the filings to set up the organization as a non profit in the State of California and obtain the non profit exemption from the IRS. Maintain all the financial records and complete the IRS and California year-end reporting. I created and maintained the budgets, cash flow, deposits and reimbursements, and banking. I assisted in organizing a conference in 2003 at Bard College and managed the financial activity (registrations, tabling, vendor sales, gifts) for the conference.

Emhart Glass, 2000-2001 30 hrs/wk
Independent Accountant

Manage the general ledger. Set up system of completion of balance sheet reconciliations. Complete reconciliation and payment of European Affiliates including foreign exchange transactions. Reestablished a procedure of tracking and reconciliation of assets and construction in progress.

Creative Orthotics and Prosthetics, 2000 part time
Independent Accountant

Evaluated and revised closing and GL procedures for efficiency. Reduced bank statement reconciliation from 3 days to 3 hours. Trained and supervised temporary AP clerk. Completed search for new accountant for position in AP and GL and trained in new procedures. Completed closings monthly.

The CBORD Group, Inc., 1998-2000
Accounting Manager

Managed five personnel who performed functions of Accounts Payable, Payroll, Benefits, Billing, and Cash receipts. Monitored contracts in progress for the CSD division ensuring correct billing and revenue recognition. Ensured monthly close with-in deadline. Reconciled inventory monthly and resolved discrepancies.

Planned Parenthood of Tompkins County, 1994 – 1998
Financial Director


Blue Cross of Western PA - VSI and HAS division, 1990 - 1994
Financial Analyst

Audited financial accounts determining areas for adjustment. Negotiated costs of Blue Cross allocations. Created and evaluated proforma and trends in operations. Coordinator of the budgeting process. Reconciled assets to the financials. $40,000 in unbilled applications and hardware through analysis of contracts. Revamped billing procedures for greater accuracy.

FUSION – Hospital Information System. Evaluated application functionality and reports, wrote specifications, directed programming teams, wrote test plans and tested code.
EXPERIENCE (Continued)

Mercy Psychiatric Institute, 1988 – 1990

Financial Analyst

Director of Budget and Reimbursement
Compiled 1989 hospital budget. Completed Blue Cross reports and Blue Cross budget reviews. Completed cost reports for Medicare, Blue Cross and Medicaid. Saved hospital $140,000 through detailed analysis of Medicare cost report desk review.


Healthcare Consultant
Performed audits. Detected $40,000 non-compliance on state reimbursement audit. Developed complex, multifaceted Lotus spreadsheets with summaries. Collected and organized over 1,000 requirements. Compiled proposals.

EDUCATION

University of North Carolina
MBA Degree - Information System concentration May 1986
Presented with MIS award

University of South Florida
Accounting Curriculum -30 credits 1983-1984
Dean's list. Secretary/Treasurer Student National Association of Accountants.

Cornell University
B.S. Microbiology May 1976
Regents scholarship for academic achievement

ADDITIONAL EXPERIENCE
CMA certification 1994 - Past Board Member ICMA (Institute of Management Accounts)
Excel, Access, and Word for Windows. Sybase, UNIX, American Fundware, Mediflex, Solomon