

**OFFICE OF THE
PRESIDENT**

UNIVERSITY TOWN HALL

WITH PRESIDENT COLEMAN AND JAMES PATTI

LAND ACKNOWLEDGMENT

A vertical image on the left side of the slide shows a hand reaching into a white library shelf filled with books. The image is tinted with a reddish-pink color. The hand is wearing a dark sweater and a watch. The books are standing upright, and some titles are visible, including one that says "over The Best Kept Secrets To Getting And".

AGENDA

General Updates

Organizational Report Follow-up

State of Nation | State of Adler| Adler Today & Tomorrow

Operational Efficiencies - Academics, Enrollment,

Brand, & Finance

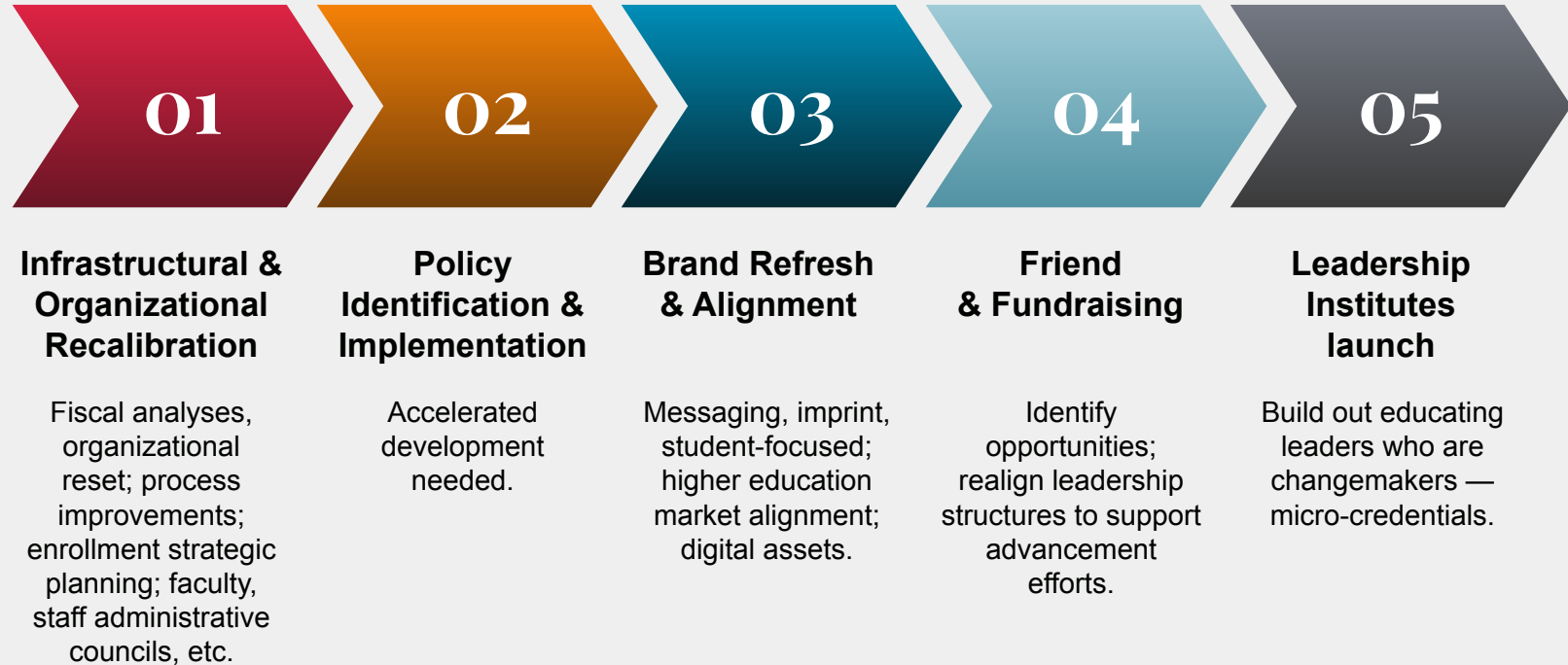
Closing Remarks

Q&A

GENERAL UPDATES

ORGANIZATIONAL REPORT FOLLOW UP

Upcoming Work



NEXT STEPS



BUILD ON KEY FOUNDATIONAL PRINCIPLES

Educating Scholar Practitioners

Cultures of Care

Societal/Social Engagement

Health Equity → Interwoven with frameworks related health justice and the social determinants of health

Wellness in Community

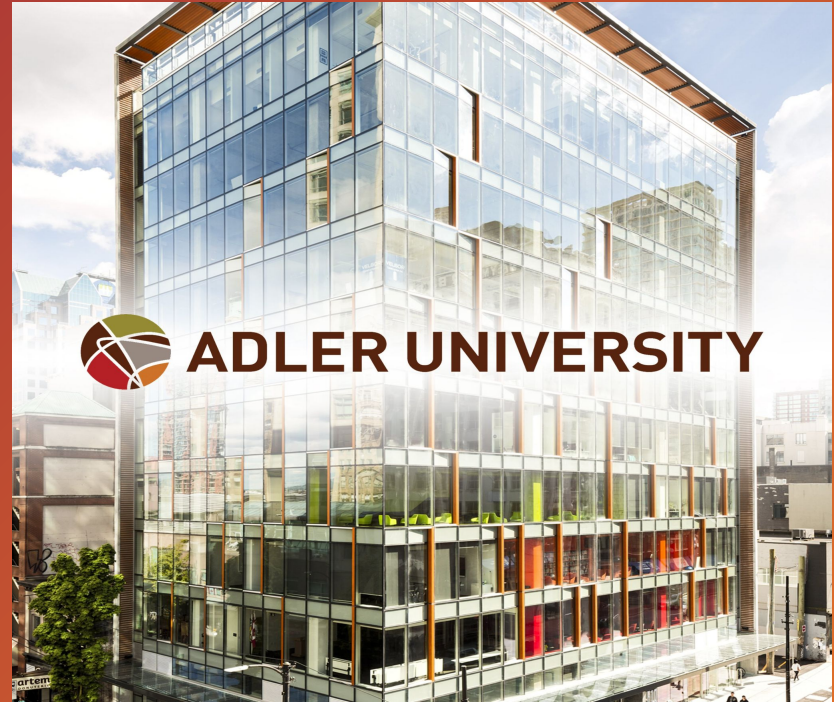
HIGHER EDUCATION LAW

- Current laws still intact.
 - Executive Orders.
 - Governmental Offices and Impact - USAID, Dept of Ed, etc.
 - Loans, grants, grad schools, financial aid.
-
- *Reorganization of the Department of Higher Education.*

HEADWINDS, RISKS & CONSIDERATIONS

- Associations & Partnership
 - ◆ ACE, AAC&U, HLC, DQAB, etc.
 - ◆ Fulbright, Relationships with other Countries, Foundations, Corporations.
- Legal
 - ◆ Layered.
 - ◆ Feds vs State.
 - ◆ In flux. Policies, Law & Guidance.
 - ◆ All current policies aligned with former legal statutes.
- Fiscal
 - ◆ Dept of Ed. elimination & increase regulatory constraints.
 - ◆ U.S. student loan policy (Financial Aid).
 - ◆ Grants & Research
 - ◆ Media & anonymous reporting.
 - ◆ International Students, Enrollment, Funding
 - ◆ Litigation & Compliance Costs
 - ◆ Conjectures & Unknowns.
 - ◆ Must Consider Growth Opportunities to Sustain University Trajectory
- Faculty, Staff, & Students
 - ◆ Phishing
 - ◆ Ongoing outreach to individuals (liability)

ADLER TODAY & TOMORROW



PRIMARY GOAL

Position the University for ongoing success with a focus on excellence in leadership & organizational operations to ensure long-term institutional growth as Adler continues to deliver on the promise to educate our students & sustain the investments of our alumni.





Non nobis solum sed omnibus.

*not for ourselves alone,
but for all.*

Gemeinschaftsgefühl

*State of social connectedness
& interest in the well-being of
others.*

- Alfred Adler began community psychology by articulating the constructs of social interest, or the connection between individual & community well-being, & systemic structural community intervention such as preventative public health measures.
- *not for ourselves alone, but for all*



- Student Centric.
- Creating breakaway leaders who are scholar & practitioners.
- Social Interests of Health Equity.
- Health Justice Frameworks.
- Health Care & Wellness Modes.
- Scholar practitioners intersection of health & care for one another, better together...

The educator must believe in the potential power of his pupil, and he must employ all his art in seeking to bring his pupil to experience this power.

— Alfred Adler —

OPERATIONAL EFFICIENCIES

INVESTMENTS

All operations to deliver on the promise to educate our students. Supporting our academic enterprises.

- Operational Excellence - all areas prioritizing fiscal, operational to build apparti for growth.
- COLA - investments in people.
- Streamline Processes, i.e. statements, policies, etc.
- Care & wellness within institution as is related to brand.
- EAB, Professional Associations, & other best practices.
- Strategic navigation of Headwings.
- Policies & compliance. Policy Task Force Underway.
- Student, Faculty (supports), Staff, & Alumni.
- Shared governance Models.
- Leadership.
- Technology & AI.
- Grants & Strategic Research Advancement.
- Board education, cultivation & strategic growth.
- Systems investments.
- Bank & Overall Strategies

Stabilization for growth upon margins of excellence.



POLICY TASK FORCE

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The Policy Task Force will establish a comprehensive, systematic approach for reviewing, updating, and revising institutional policies to ensure compliance with federal, state, and provincial laws, as well as accreditation and higher education best practices.

While actively updating policies to meet requirements (including those legally mandated), the Task Force will work to develop a sustainable framework for ongoing policy evaluation. This work aims to enhance policy clarity, relevance, and effectiveness while promoting institutional integrity, transparency, and accountability.

Review + urgent updates completed by early Summer

Continued policy development and creation of a “Policy on Policies” document will continue into Fall 2025

ACADEMIC AFFAIRS

ENROLLMENT

- Enrollment, Admissions processes & development.
- Faculty Engagement
 - ◆ Reimagining marketing participation is crucial.
 - ◆ Grant development - participation is crucial.
 - ◆ Narrative + Adler Story
 - Faculty
 - Student
 - Staff and
 - Alumni Stories.
- Department and programmatic processes.
- Clear timelines.
- Rubrics.
- Consistency for evaluation.



BRAND COMMUNICATIONS + MARKETING

Setting the Foundation for an Authentic, Impactful + Galvanizing Brand

01 | Establish a Clear and Cohesive Institutional Identity

Refining Adler's brand and visual identity to create a unified, recognizable presence across all campuses, programs, and digital platforms, reinforcing its core mission and values.

02 | Enhance Adler's Messaging for Clarity and Impact

Refine Adler's messaging to create a unified, Adlerian narrative that unites faculty, staff, and students around a shared story of purpose and transformation, while also captivating prospective students.

03 | Build a Website That Enhances Engagement and Accessibility

Build a dynamic, user-first website, making it easier for all audiences to access information, engage with the Adler community, and experience the brand's mission in action.

FINANCE UPDATE

- We have stabilized the budget BUT we must remain vigilant
- We MUST identify key growth areas, build upon data based information now, and remove system bottlenecks
- Position the University for sustainability



AGENDA

FY24 Financial Audit Results

FY25 Year-to-Date Operating Performance

FY26 Budget Timeline



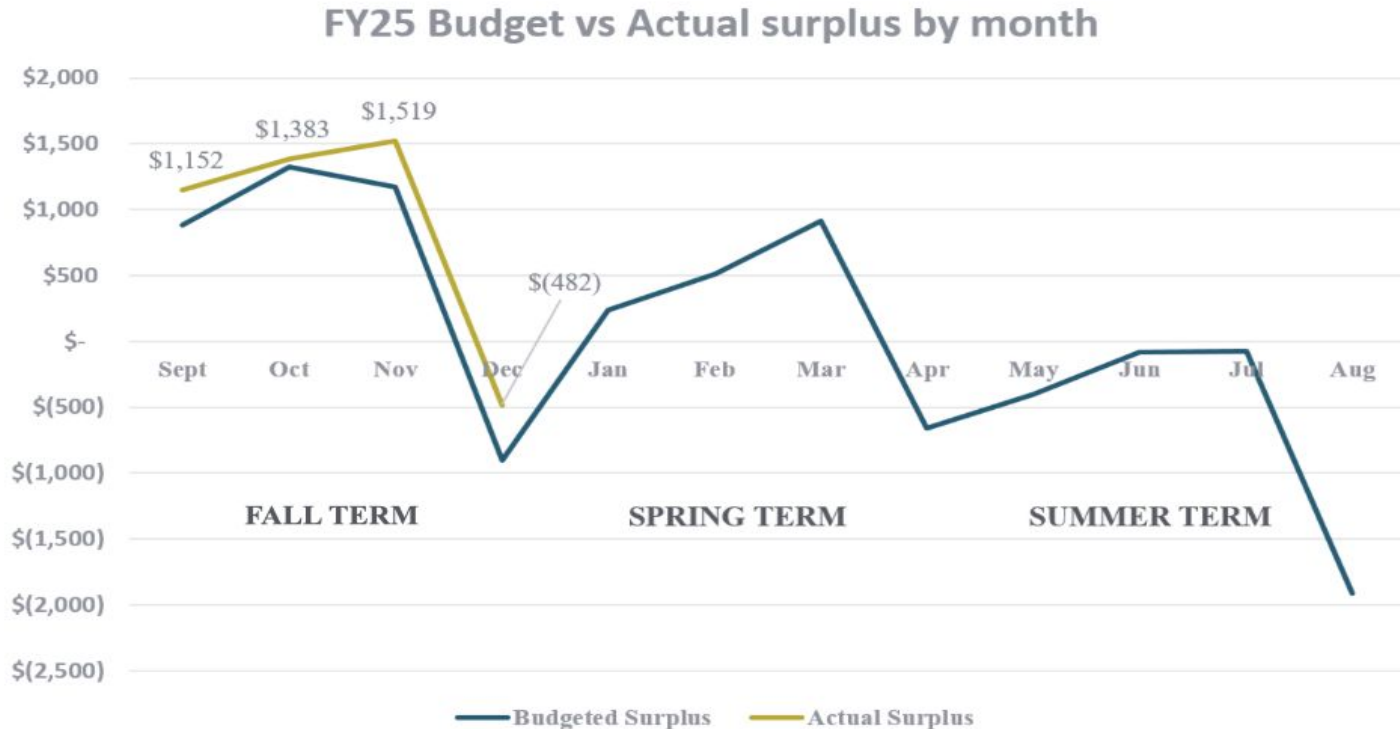
FY24 Audit Results

- Adler received a clean audit opinion on our financial statements, thanks to our Accounting teams in Chicago and Vancouver.

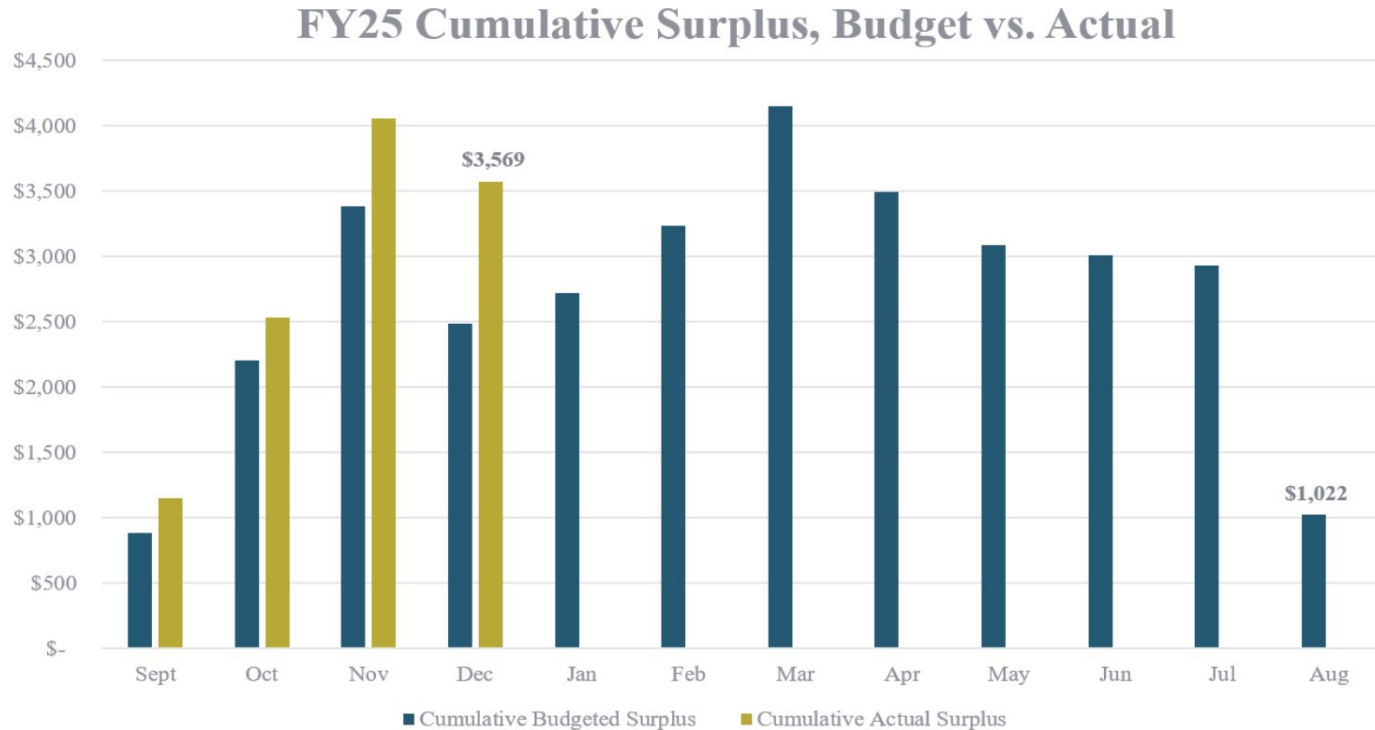
Total Revenue:	\$42.7M
Total Expenses:	<u>\$43.5M</u>
Net Income:	<u>\$(821K)</u> vs. <i>\$(968K) internal.</i>
Add: Investment Gains	<u>\$387K</u>
Change in Net Assets	<i>\$(434K) including unrealized gains</i>

- As promised, the audit will be shared with you all later today in Inside Adler.

FY25 YTD Surplus Tracker



FY25 YTD Surplus Tracker



FY26 Budget Process

April:

- Establish initial revenue assumptions/expense budget parameters; review with President.
- Stakeholder engagement: faculty, staff, students.
- Training for budget managers re: expectations & system (X unique cost centers)

May:

- Finalize staffing plans for each department.
- Non-compensation budgets entered by department managers (zero-based philosophy using eight months of FY25 actuals).

FY26 Budget Process

June:

- Consultations and conversations with departments/functional leadership.
- Refine enrollment projections based on current data.
- Establish non-tuition revenue targets (grants/gifts/fed work study/interest).

July:

- Presidential review and funding decisions.
- Board consideration at meeting on July 31.

CLOSING COMMENTS

Q&A