Advancing concrete masonry for better building.
Closing a Decade with New Energy

As we begin to look forward to a new decade, we find our industry energized. NCMA’s role is to position concrete masonry, segmental retaining walls and manufactured stone veneer as the primary choice for “equipping better building.” Through a steady partnership of staff and members, we have achieved a lot in 2019. Despite the recent pandemic that hit the world, closed businesses and shocked the economy, we think about the resiliency of our industry. Not only in our building products themselves, but in our industry. We have seen a lot of ups and downs over the last 100-plus years and we are going to continue to move forward. Reflecting on all that we accomplished last year alone, we know that we will continue to be resilient regardless of what obstacles may be presented.

We are continuing to look forward to a new decade...

This Annual Report highlights what we have accomplished in 2019 and shows how our association is working for us and with us. We are influencing codes, standards and regulations. We are educating designers and installers. We are working to increase membership and member engagement. We are developing strategies to strengthen and grow businesses. We are also a community that continues to work together to advance the industry.

Hope you’re as excited as we are.

Darryl Winegar
Midwest Block and Brick
2019 NCMA Chair of the Board

Robert D. Thomas
NCMA President
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<th>Topic</th>
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STRATEGIC GOAL:

Influence Codes, Standards & Government Regulations
Launched in early 2019, the Direct Design Software has revolutionized a masonry project workflow, saving time by designing an entire masonry structure in minutes with a few simple inputs. With more than 150 registered users in 2019, the software has been used for countless projects. Designers who have used the software have praised the simple user interface and the complete transparency of design calculations presented in the software’s reports. Recent updates included an import/export feature that works with Autodesk Revit, further simplifying workflows for designers.
2020 I-CODES
Focus on fire safety and envelope protection

The International Codes (IBC, IRC, IECC, IFC) are the most widely accepted, comprehensive set of model codes used in the United States. All fifty states, the District of Columbia and many other countries have adopted the I-Codes at the state or jurisdictional level. The finalization of the 2021 editions of these model references, was completed in 2019, which will be followed by subsequent review and adoption across the country. Fire safety and envelope protection were key topics during this recent update cycle, spurred by the adoption of tall wood buildings against the backdrop of devastating building fires around the world and ongoing litigation stemming from using moisture-sensitive construction materials. By leveraging resources through the Masonry Alliance for Codes and Standards (MACS), NCMA was able to overturn unsubstantiated revisions that would have burdened manufactured concrete product systems or advanced competing systems.
ENERGY CONSIDERATIONS
Drafting of thermal bridging and thermal properties standards

The Joint American Concrete Institute (ACI) and The Masonry Society (TMS) Committee 122 began work on developing new mandatory language standards for energy considerations for concrete and masonry systems. These new documents focus on mitigation of thermal bridging and standardized thermal properties of materials. The Committee will continue to work in 2020 and beyond to complete and publish these documents, which will provide consensus-based, rational energy provisions for masonry and concrete systems, enabling designers to better utilize these systems for energy performance.
Manufactured concrete products show promise in freezing conditions

NCMA’s R&D Laboratory continued to collaborate with the Federal Highway Administration (FHWA) to conduct research to better integrate manufactured concrete products into state and federal transportation projects per ASTM C1262, the test method used for freeze-thaw durability of segmental retaining wall (SRW) units. Observations show that SRW unit field performance tends to be better than indicated by laboratory testing. FHWA is conducting ongoing research to assess the freeze/thaw performance of full-size manufactured concrete products rather than coupons obtained from full-size specimens. To evaluate the relative performance, NCMA is working with FHWA to perform a side-by-side comparison study on coupons. In addition to evaluating relative performance between specimen sizes, the research will also investigate other performance metrics beyond mass loss. Research will continue in 2020.
FEMA EARTHQUAKE RESISTANCE
Using concrete masonry for resiliency

With the increasing number of natural disasters that strike across the country each year, design and construction methodologies are changing to save lives. Through leveraged funding in cooperation with the Federal Emergency Management Agency (FEMA) and the Applied Technology Council, full-scale masonry research and computer modeling has demonstrated that current masonry design standards produce designs that meet or exceed targeted resiliency criteria for large-scale earthquakes.
**ICC 500 & 600**  
**Keeping people safe during extreme events**

Ensuring concrete masonry buildings are resilient and occupants are safe during extreme events is very important. Due to NCMA staff’s extensive and active participation in the International Council Code (ICC) committees, two ICC standards - ICC 500 (for design and construction of storm shelters) and ICC 600 (for residential construction in high wind regions) – are being updated. In particular, ICC 600 is being expanded to cover other events beyond high wind. NCMA staff has and will continue to work to ensure that concrete masonry construction is represented and the provisions developed result in safe and resilient structures.
NORTH AMERICAN CONCRETE ALLIANCE
Partnering to advocate policies and legislation

The North American Concrete Alliance (NACA) is a coalition of twelve concrete-related associations formed for the purpose of addressing industrywide concerns and initiatives in the areas of research, safety, education and government affairs. The partnering organizations truly collaborate to support common objectives and support each’s individual objectives. NCMA participated in the 2019 Cement and Concrete Fly-in in April 2019 along with other NACA partners.

Some of the primary issues the organizations advocated include:

- Comprehensive and long-term funding mechanism to support an increase in federal infrastructure investment, including workforce development and funding for resilient construction of public facilities

- Passage of the *Disaster Recovery and Reform Act* to continue efforts to place greater emphasis on pre-disaster mitigation to help communities better withstand future disasters and ultimately save taxpayer dollars

- Availability of federal grants to the industry or sector partnerships to improve training, on-the-job learning opportunities, encourage mentorships, improve awareness about careers and provide resources to help workers obtain and hold jobs

- Specific inclusion of the term “resilient construction” in federal policy to differentiate from other, more generalized, uses of the term
NCMA advocated for the inclusion of specific language relative to the use of manufactured concrete products in construction into the 2020 Transportation, Housing and Urban Development and Related Agencies’ (THUD) appropriations bill. At NCMA’s request, report language was added to the bill encouraging federal investment to further the use of Geosynthetic-Reinforced Soil-Integrated Bridge Systems (GRS-IBS). The report language also called for federal investment in researching the performance of guardrails used in conjunction with geosynthetically reinforced soil systems under vehicle impact.
NCMA POLITICAL ACTION COMMITTEE
NCMA PAC provided campaign contributions to 22 different elected federal officials who support positions important to the interests of NCMA members.

PAC funds available at the end of 2019 total $116,000.

POLITICAL BUILDING BLOCKS
NCMA President Robert Thomas participated in the May 1 episode of Political Building Blocks, “Hard Fact.” During the podcast, Bob discussed the importance of getting national support for building with materials, specifically concrete masonry, that have the ability to withstand fire, earthquake, moisture, etc. and why building stronger has a long-term cost benefit.

CMU CHECKOFF

With the passage of the Concrete Masonry Products Research, Education and Promotion Act in late 2018, the concrete masonry industry began the next step of the process. Throughout 2019, NCMA worked with industry leaders and the Department of Commerce to get the provisions of the bill into a draft phase. At NCMA’s 2019 Midyear Meeting, a CMU Checkoff Session was held to educate producers and industry partners on the positive impact the Checkoff program will have on the industry. Once the draft is published in 2020, producers will have roughly 140 days to approve the CMU Checkoff. To learn more, visit www.cmucheckoff.com
STRATEGIC GOAL:

Increase Impact of NCMA Resources
NEW WEBSITE LAUNCHED

NCMA’s new website launched in 2019. Carefully devised over the previous year by an experienced team of writers, designers and developers, the website’s sleek, modern look is visually striking thanks to a colorful, yet minimal aesthetic. The new design includes a hub for recent news and updates regarding member companies and the industry as a whole, as well as the broader economy in general. Altogether, the new site lends itself to a seamless experience on desktop and mobile devices, making it easily accessible virtually anywhere. Since its launch, the website has experienced a sharp increase in traffic over the previous year.

<table>
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<th>Total Annual Page Views</th>
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<td><strong>460,134</strong></td>
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<tr>
<th>Total Annual Sessions</th>
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<tbody>
<tr>
<td>84,484</td>
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<td><strong>202,026</strong></td>
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</table>
FIGURE MODERNIZATION AND NEW TEK LOOK
To better utilize NCMA’s technical resources, a new layout and streamlined organization was initiated in 2019. The new layout better integrates with NCMA’s visual identity, providing a clean, modern look to technical resources. Efforts also began to modernize NCMA’s technical figures which includes full 3D renderings and multiple download formats to better meet the needs of members, designers and specifiers.
SHARP INCREASES IN SOCIAL MEDIA FOLLOWING IN 2019

Facebook following

37% increased ‘Likes’ in 2019

LinkedIn following

82% increased ‘Followers’ in 2019

24.28% of visitors to NCMA’s website were in sales, while 17.17% were in business development.

SOCIAL MEDIA POSTS AND OUTREACH
Best performing posts on social media

“Concrete block was a ‘no-brainer’ option.”

Reached 1,185 individuals on Facebook and an additional 760 individuals on LinkedIn.

On May 28, 2019, the new NCMA website was featured for Tech Tip Tuesday, reaching 1,432 on Facebook and 1,598 on LinkedIn.
STRATEGIC GOAL:

Influence and Support Decision Makers
EDUCATING DESIGNERS ABOUT MEMBERS’ PRODUCTS

Authorized NCMA Continuing Education Facilitators (CEF) are industry professionals that teach NCMA-approved education sessions to architects for continuing education credit through the American Institute of Architects Continuing Education System (AIA/CES). The number of CEFs authorized by NCMA increased to 28 nationwide, adding 17 in 2019. NCMA has also offered two courses on AEC Daily, where architects go to get their education online.

- *Concrete Masonry: The Energy Efficiency Solution* reached over 1,000 architects and 700+ took the course.

- *The Next Generation of Concrete Masonry* went live February 2019 and reached over 600 architects with over 400 taking the course.

Through all these efforts, NCMA reached over 2,300 architects with NCMA education in 2019.
2019 SALES SURVEYS
Manufactured concrete products market continues to show growth

Concrete Masonry Units

Data collected in 2019 from the CMU Sales Survey showed a 2.8% increase in CMU in the US and 1% increase in Canada sales from 2017 to 2018. Forty-seven companies responded to the survey, representing sales of 512 million units in the US and Canada in 2018. The respondents represented 206 total plants.

Segmental Retaining Wall Units

Results from the 2019 SRW Sales Survey showed an overall increase in sales of 1.1% from 2017 to 2018. Respondents represented 196 plant locations and 43 companies, throughout the US and Canada.
MANUFACTURED STONE PRODUCT CERTIFICATION

Raising the bar for products

Two manufactured stone producer members achieved certification for their products in 2019. Initially launched in 2018, this certification demonstrates compliance with product standards and commitment to quality, and can be used by specifiers to ensure product conformance to both consensus standards and industry guidelines. Efforts in 2020 will focus on promoting this program to external audiences, including designers, specifiers and homebuilders.
TRADESHOW PARTICIPATION
Providing our message to broader audiences

NCMA participated in two major concrete-related events during 2019. During the World of Concrete in Las Vegas, NCMA was an endorsing sponsor at Masonry Madness, where the best masons in the world gathered to compete in tightly contested competitions that boast highly coveted prizes to the winners. The association also was a presenting sponsor of Hardscape North America (HNA) which took place in Louisville, Kentucky, and is considered the premiere hardscape show for contractors, dealers and distributors.
STRATEGIC GOAL:

Educate Industry Professionals and Improve Installer Workforce
INDUSTRY EDUCATION
Bringing education to a new level

2019 was a record year for NCMA educating industry professionals. Some statistics:

• NCMA EDU Online has 1,406 users all time, with 301 of those users active in 2019.

• Revenue in sales from online classes was nearly $15,000 in 2019.

• 21 new Concrete Masonry Technologist (CMT) were certified in 2019

• 64 individuals attended in-person NCMA courses including:
  • Basic Block and Hardscapes Sales School
  • NCMA/ICPI Commercial Hardscape Sales Course
  • Concrete Masonry Level 2 Sales Course
SRW INSTALLER COURSES
Ensuring SRW construction is done right

The NCMA SRW Installer Certification Program continues to recognize qualified installers.

- Total number of Certified Installers – 922 all time
- SRW Advanced Residential and Commercial Programs – 16 new certifications
- SRW Installer Certification Program update – 151 new certifications (540 individuals educated in total)
- SRW Recertification – 292 individuals recertified
- SRW Installer Trainers – 65 individuals

@HARDSCAPINGIS LAUNCHED
Reaching the next generation of skilled labor

Workforce development for hardscape installers is a major focus of NCMA’s SRW & Hardscape Products Committee. Through a partnership with the Interlocking Concrete Pavement Institute, a new social media persona, @HardscapingIs, was launched in 2019. This persona is used to deliver a coordinated promotional campaign to 17-20 year olds through Instagram and a complementary campaign to their parents on Facebook. The overall goal is to increase exposure and interest to the hardscape installation industry as a worthwhile career path for young individuals.
STRATEGIC GOAL:

Increase Membership and Member Engagement
MEMBERSHIP OUTREACH
Investing in our industry’s future

In 2019, the NCMA Membership Committee pushed to recruit new young professionals from member companies (YPs) who have not previously attended the Annual Convention or Midyear Meeting. The committee provided free registration to those identified, resulting in eight new YPs attending the Annual Convention and five at the Midyear Meeting. The committee is continuing to engage these individuals and offering free registration again to new young professionals in the industry.
CONCRETE WOMEN CONNECT
Providing a forum for women in the industry

Inaugurated at the 2019 Annual Convention in Orlando, FL, Concrete Women Connect gathers women in the manufactured concrete industry to network with each other. Over 30 women attended the first event reception. The second event was held during the Midyear Meeting in Seattle with speaker Terri Grulke of Besser Company. Amy Pierce of LANXESS Corporation heads up this group and a quarterly email is sent to over 50 women in the industry.
Engaging the younger generation of industry professionals

NCMA held two Young Professional workshops this year: one last spring in Grand Rapids, MI, hosted by Pathfinder Systems, and one in the fall in Atlanta, GA, hosted by ACM Chemistries, Inc. Over 20 YPs attended each of these workshops to network with each other and learn from engaging speakers on leadership topics such as: finding your path to leadership, coaching for career success, and ensuring self-care while working and traveling. Speakers included a YPG panel, as well as presentations by NCMA members Bobby Staten (Lee Brick and Block) and Dean Jurik (ACM Chemistries, Inc.).
ICON-XCHANGE RETURNED IN 2019
After a highly successful ICON EXPO, ICON-Xchange brought the excitement and energy of the manufactured concrete products industry to Orlando. The ICON-Xchange provided industry producers and suppliers with a unique venue to expand business relationships and learn from each other. More than 285 individuals participated in over 805 meetings during the B2B Exchange as well as networking and committee meetings during the NCMA Annual Convention. Highlights of the Annual Convention included five stops on the Virtual Plant Tour and award presentations. Former NCMA Board Chair Don Gordon of Atlas Block Company and past president of Rinker Materials Karl Watson, Sr. were inducted into the NCMA Hall of Fame for their commitment to the industry. ICON EXPO: Machinery & Equipment Show is scheduled for February 12-13, 2021 in Nashville, TN.
MIDYEAR MEETING
Gathering in Seattle

Almost 320 NCMA members gathered in Seattle to participate in 50 hours of more than 30 committee meetings to strategize and move the industry forward. Highlights of the Midyear Meeting include the Unit Design Competition where national winners were crowned, the Town Hall Meeting and member award presentations. Past Chair of NCMA Board Charles Newsome of Johnson Concrete Products was inducted into the NCMA Hall of Fame.

The Columbia Tower Club was the venue for the inaugural Associate member-hosted BLOCK PARTY! In addition to providing jaw-dropping views of the Emerald City, Mount Rainier and the vast adjacent Puget Sound, the Columbia Tower Club served up some of the region’s finest cuisine, friendly games and excellent networking.
NCMA LABORATORY
Accreditation and expansion of scope

In 2019, the NCMA Research and Development Laboratory had its biennial IAS (International Accreditation Service) audit and was successful in renewing the accreditation for two more years. In addition, the Lab has expanded its scope of accreditation for testing ASTM C157/C157M – 17, *Standard Test Method for Length Change of Hardened Hydraulic-Cement Mortar and Concrete*. The complete list of testing can be found on the NCMA website at www.ncma.org/resources/lab/.
SAFETY AWARDS
Record year for awards

Recipients of NCMA/ICPI Safety Awards continued to grow in 2019. Twenty-seven production locations were recognized with Milestone Awards (no accidents for more than five years). Seventy-six facilities received Platinum awards (no recordable injuries), and 47 facilities received Gold and Silver awards. The high number of awards presented is a testament to NCMA and ICPI members’ dedication to safety.
STRATEGIC GOAL:
Association Strength — Fiscal, Operational, Industry Leadership
**FINANCIALS**

**REVENUES**

- 44% Member Dues
- 21% Industry Meetings & ICON-Xchange
- 10% Education and Programs
- 10% Research and Development Lab
- 6% Commodity Checkoff Program
- 2% Investments & Rental Income
- 2% Foundation
- 2% Commodity Checkoff Program

Total Revenues: $4.94M

**EXPENSES**

- 29% Industry Meetings & ICON-Xchange
- 12% Industry Advocacy
- 19% Operations
- 10% Commodity Checkoff Program
- 11% Research and Development Laboratory
- 6% Communications & Marketing
- 4% Membership
- 2% NCMA Foundation

Total Expenses: $4.67M

**NET ASSETS**

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<tr>
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<th>2019</th>
<th>2018</th>
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<tr>
<td>Net Assets, Beginning of the Year</td>
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<td>Net Income</td>
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<td>Investment in Checkoff Program</td>
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The 2018 figures reflect those in NCMA’s audited year-end financial statements. The 2019 figures are preliminary and subject to change pending audit.
The NCMA Education and Research Foundation continues to be a valuable source to advance and support the manufactured concrete masonry and hardscape industry. Since incorporated in 1988, The NCMA Foundation has funded 100s of projects and invested more than $2.5 million in grants to industry research for codes and standards, educational opportunities for architectural and engineering students and workforce development. This Annual Report lists the projects that we have tackled in 2019. While some of the research spans more than one year, other projects are completed on an annual basis. We have selected a few projects to highlight for this report, but you can learn more about each one on our website. www.ncma.org/foundation

Kevin Curtis
Besser Company
2019 NCMA Foundation Chair
BIM-M

BIM for Masonry (BIM-M) is a success story for the masonry industry, bringing together a consortium of industry associations focused on a singular goal – ensure that masonry is well represented in BIM software and is able to serve the needs of designers in a digital world. From 2011 until 2019, the NCMA Foundation invested over $350,000 in this effort, which resulted in a number of deliverables and charted a course for the use of masonry in BIM. This initiative created tools for designers, manufacturers, and contractors using BIM and also provided exposure of masonry to BIM users through events such as the BIM Forum. While the BIM-M consortium has sunset, the work is not done. The NCMA Foundation continues to invest in projects creating and enhancing digital technologies for concrete masonry.

Some specific deliverables from the BIM-M Initiative:

- Masonry Unit Database – the MUD provides BIM users with masonry unit information that can be used in BIM. In addition to a database that is publicly available, a plug-in for Revit was also created to access the MUD.
- Masonry Wall Content Pack – a free plug-in for Revit that provides users with a library of common masonry elements – including walls, lintels, columns, and more.
- Contractor’s Guide to BIM – a free publication that educates contractors on how to integrate BIM into their businesses, along with real life success case studies.
- Direct Design/Revit Connection – Direct Design Software is an easy-to-use concrete masonry building design software. Through BIM-M funding, an import/export feature to and from Revit was added to simplify workflows for BIM users.
The NCMA Foundation was a Diamond Sponsor for The Masonry Society’s 13th North American Masonry Conference (NAMC). This conference successfully hosted more than 220 individuals from more than 20 countries. Chaired by Dr. Fernando Fonseca, the conference provided technical content (from more than 150 presentations), networking opportunities, and a friendly and inviting atmosphere. In addition, approximately 10 exhibitors and 17 Innovative Technology Sessions allowed industry partners to interact with attendees, share their products and learn. Dr. Patrick Dillon of WDP and Associates led the technical program, coordinating reviews and presentations of excellent technical content. The conference is held every four years.
PROJECTS COMPLETED IN 2019

- Direct Design Software Development – v3.0 – PI: Ensoltech
  - Finalized the third version of this powerful design tool

- Assessment of SRW Units Stability During Construction – PI: NCMA
  - Provided information for NCMA committees to address technical issues

- Development of Two Online Education Modules for Architects through AEC Daily – PI: NCMA
  - Delivered needed education on concrete masonry to architects and designers

- 2018 Architecture Student Design Competition – PI: Pennsylvania State University
  - Engaged the next generation of architects

- Unit Design Competition 2019 – PI: NCMA
  - Encouraged undergraduate students to learn about CMU and SRW production and design unique products

- Making the Case for CMU Residential Design and Construction (Phases 1 & 2) – PI: Syracuse University
  - Developed preliminary designs for urban residential homes using CMU

- Architecture Student Design Competition – Dry Stack Masonry Construction Around the Globe – PI: Ball State University
  - Engaged the next generation of architects

- NCMA Engineering Internship – PI: NCMA
  - Engaging a student in masonry research at NCMA’s Laboratory
Designers and researchers from both Canada and the United States have been participating in the CANUS Masonry Design Summit. The primary objective is to conduct a comprehensive comparison of the requirements of the design standard in both countries, design results, and corresponding loading criteria applicable to the US and Canadian markets for concrete masonry construction, and identify short-term revisions that can be implemented to improve and harmonize these standards. Additionally, the group has been developing long-term research needs that can influence both countries codes and standards. The summit was held in October 2019, where participants met for a week.
PROJECTS FUNDED IN 2019

- Development of Lambda Factors for Lightweight Grout – PI: Clemson University
- *Direct Design Software*: Updates/Enhancements For V3.2 and beyond – PI: Ensoltech, Inc.
- Architecture Student Design Competition – PI: Bowling Green State University
- Technical Details Modernization – PI: NCMA
- Calculated Fire Resistance Regression – PI: Western Kentucky University
- Freeze-Thaw Durability Assessment of Manufactured Segmental Retaining Wall Units with Crumb Rubber Aggregate – PI: NCMA
- 2019 Architecture Student Design Competition – PI: Pennsylvania State University
- Dry-Stack Prism Recalibration – PI: NCMA
- *SRWall* Design Software Upgrade – PI: Ensoltech, Inc.
- Prism Aspect Ratio Recalibration – PI: NCMA
- Making the Case for CMU Residential Design and Construction (Phases 3 & 4) – PI: Syracuse University
- Non-destructive Evaluation (NDE) of Manufactured Units – PI’s: NCMA and SoundQA Solutions
- Creation of Third Online Education Modules for Architects thru AEC Daily – PI: NCMA
- 2019 Design Build Competition – PI: Pennsylvania State University
### FINANCIALS

#### REVENUES

- **$1,532,822** 2019 TOTAL
  - **$1,153,637** New Contributions
  - **$378,426** Investment Income/Realized Gains
  - **$100** Other
  - **$1,153,637** Unrealized Gains/Losses

#### EXPENSES

- **$448,488** 2019 TOTAL
  - **$83,248** Administrative Expenses
  - **$75,499** Program Support Expenses
  - **$289,741** Program Grants & Scholarships Awarded

### NET ASSETS

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<th>2018</th>
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