

# 2015 ANNUAL REPORT



ENNEAGRAM  
IN THE NARRATIVE TRADITION



# 2015

## THE YEAR OF INTEGRATION

# Contents



*Enneagram Narrative Learning Community, Dayton, OH*

- 3 President's Letter
- 4 2015: The Year of Integration
- 7 Enneagram Narrative Curriculum
- 8 ESNT Board of Directors
- 9 Core Faculty
- 10 Our Staff
- 11 2015 Donors
- 12 2015 Financials
- 14 Your Gift Matters
- 15 How to Support Us





We called 2014 our **Year of Generativity**, laying a solid base for future growth with major changes in ESNT's programs and organizational structure. Looking back now, we see 2015 as our **Year of Integration**, by which we mean the time we began to consolidate and build on those new elements of our work. This annual report will paint a broad picture of our goals and accomplishments. Here I would simply like to offer a few less obvious details that underscore the sense of progress I personally have about our work last year.

We began 2015 with a brand new **Board of Directors**, few of whom knew each other. While each brought different life experiences, perspectives and histories with the Narrative Tradition, we all shared the same values and vision for the organization. As the year went on, our monthly meetings gained depth and aliveness. Each member took on more responsibility for the various tasks required to operate a far-flung, complex organization. By the end of the year, we were a strong team of five, all pulling evenly on the traces with a shared commitment to the work. And in December we were ready to add another board member, Ahshua Bolton, who brings much needed business experience and a passionate enthusiasm that has reinforced the energy in all of us. Welcome, Ahshua!

Our second year of **fundraising** was also a success. The 2015 campaign produced an increase of 30% in the number of donors and 34% in revenue over the prior year. This could not have been done without the support of many people, but I want to extend particular thanks to **Debbie Burditt** and **Kim Stege** for their encouragement and hard work on the campaign. Because of this success, we are on track with our plan for gradually replacing the declining grant that has been a major support to ESNT in its foundational years.

I reported at the end of last year that **Mary Jo Ruccio**, our beloved Executive Director, will be retiring in spring 2016. Though we are all sad to see her go, it is a testament to the growing strength of ESNT that we are meeting the challenge of yet another historic change with confidence and the engagement of many stakeholders. So I am, again, optimistic that there will be more good news in the next annual report!

With best wishes to all for a year of peace, prosperity and personal growth,

**Paul Strasburg**  
**President, Board of Directors**  
**Enneagram Studies in the Narrative Tradition**

We see 2015 as our Year of Integration, by which we mean the time we began to consolidate and build on those new elements of our work.





In 2015, Enneagram Studies in the Narrative Tradition devoted organizational energy to consolidating major initiatives of the past several years and adding new elements to make those initiatives even more effective. This integration took place at both the program and organizational management levels.

## Functioning as a Unified Whole

2015 marked the second full year of our integrated **Enneagram Narrative Curriculum**, which combines psychological, spiritual and somatic learning. More than 600 participants attended 23 Core Programs and Expanded Enneagram Professional Training Programs in the U.S. and Canada. We certified four new Enneagram Narrative Teachers, and five participants became the first to certify through our new Enneagram Narrative Professionals track, designed to address the needs of therapists, counselors, coaches and spiritual directors.

2015 also marked the first full year of governance by an expanded **Board of Directors**, carrying forth the vision of our co-founders, **Helen Palmer and David Daniels, MD**. The Board is focused on creating a sustainable future for ESNT through program excellence, responsible fundraising and accountability to the Enneagram Narrative Community, while daily living out the ESNT values we hold dear.



*The Enneagram for Therapists, Counselors and Coaches, Menlo Park, CA*



## Synthesizing Options and Opportunities

ESNT continued to explore new ways to make our trainings and internships more adaptable to the lifestyles of our students, teachers and practitioners. **Online internships** were developed for participants in our Professionals track, allowing flexibility without compromising quality for those seeking certification. We also started offering **CCEs for Professional Coaches** through the International Coach Federation.

We expanded our **global reach** in service of our vision of transforming human consciousness by expanding self-awareness and interpersonal understanding worldwide. ESNT added Singapore to our **International EPTP**, with the Enneagram Intensive and Typing Process now taught in 11 countries. Last year, more than 340 students attended our international programs, including 24 participants in Singapore.

In September 2015, ESNT launched a new **Collaboration Initiative** designed to make our teachings more accessible to people throughout the U.S. and Canada by partnering with Certified Teachers and other Enneagram enthusiasts to bring **Enneagram Narrative Weekends** to their communities. An individual or group gathers students and provides the necessary logistical support for one of our Core Faculty members to teach the fundamentals of the Enneagram Narrative and support the development of a local Narrative community. The pilot program in Oklahoma last fall sold out with 45 participants, and a follow-up weekend was scheduled for 2016. We also began conversations for potential collaborations with other cities, including New York, NY and Birmingham, AL.



*Inaugural Enneagram Narrative Weekend, Oklahoma City, OK*



## OUR HISTORY

In the early 1970s, Helen Palmer began teaching Enneagram panel workshops in the Narrative Tradition. In 1988, she published *The Enneagram: Understanding Yourself and the Others in Your Life*, a perennial bestseller available in 26 languages. That same year, she co-founded the **Enneagram Professional Training Program (EPTP)** with Stanford psychiatrist **David Daniels, MD**. Our organization has evolved into an educational nonprofit to sustain and promote this foundational work worldwide through an **Enneagram Narrative Curriculum** that integrates psychology, spirituality and somatics, and other Enneagram programs grounded in the Narrative Tradition.

## Honoring Where We Have Been and Where We Are Going

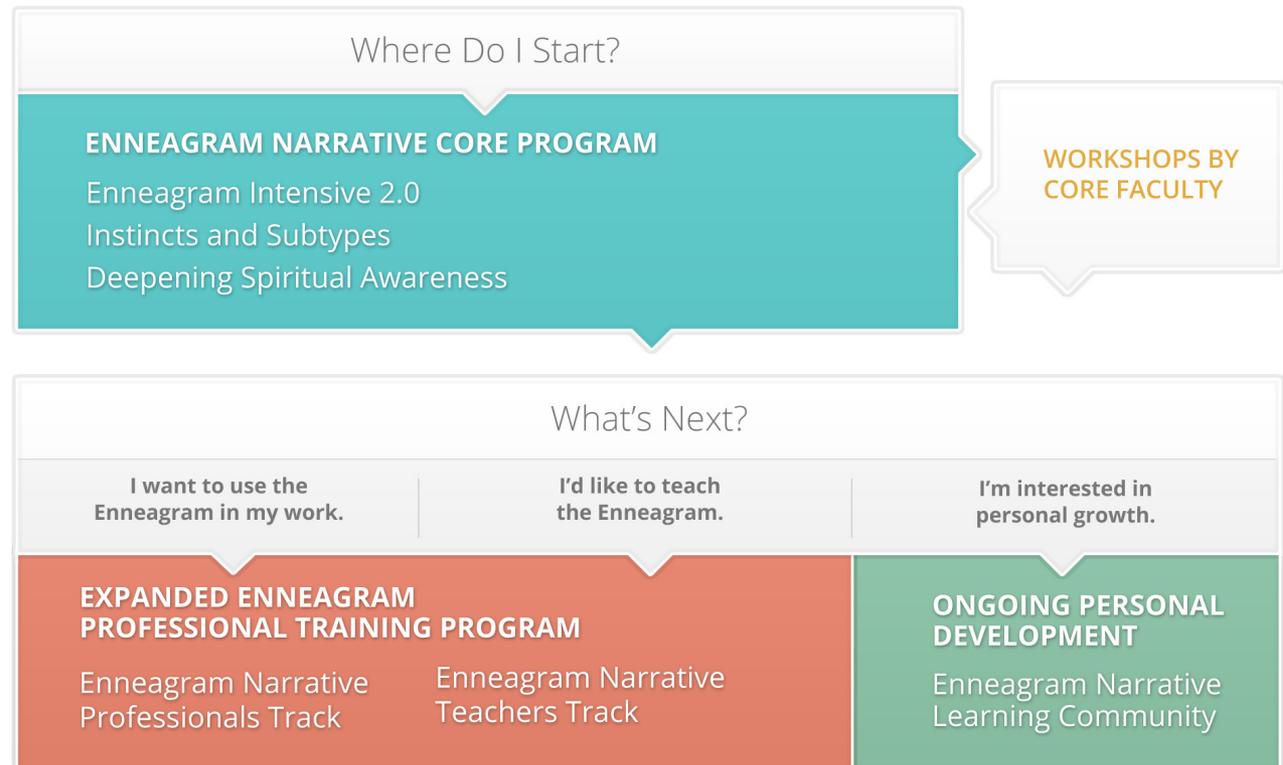
After seven years of dedicated service to the Enneagram Narrative community, Executive Director **Mary Jo Ruccio** announced in December 2015 that she will retire in spring 2016. Mary Jo was instrumental not only in forming the nonprofit entity that has become ESNT, but also in laying the groundwork for our organization to thrive in the future.

Under Mary Jo's steerage, ESNT created a **solid management infrastructure** to support our Enneagram Narrative Curriculum and make the programs more easily accessible to students. We launched a completely redesigned website, [www.enneagramworldwide.com](http://www.enneagramworldwide.com), with updated branding, expanded and readily available learning materials such as videos and guidance to additional resources, including a searchable calendar and a find-a-teacher section. Programmatically, Mary Jo guided development of the **revised curriculum** emphasizing the integration of psychology, spirituality and somatics. A new **certification track** was added for professionals working one-on-one with clients, and the teacher track certification was revised to give participants more skills and practice.

Mary Jo's leadership will be missed. The Board of Directors, Core Faculty and Staff extend their deepest gratitude and thanks for her many years of commitment to the Narrative Tradition. The Board has launched a search to find the next Executive Director for ESNT who will build on Mary Jo's foundational work and continue in our mission of transforming lives and creating a more compassionate world.



2015 marked the second year of our integrated Enneagram Narrative Curriculum, which combines psychological, spiritual and somatic learning.



- More than **600 participants** attended **23 Core Programs** and **EPTP trainings** in the U.S. and Canada.
- More than **340 additional students** attended International Enneagram Professional Training Programs in **11 other countries worldwide**, including 24 from Singapore.
- We certified **four new Enneagram Narrative Teachers** and the first **five Enneagram Narrative Professionals**.
- We opened registration for a **second Enneagram Narrative Learning Community** that successfully launched in 2016.
- **ESNT Core Faculty members presented workshops** on a wide range of topics in the U.S. and Canada, and in Australia, China, France, Mexico, Singapore and the U.K.



The ESNT Board is committed to steering the organization toward a sustainable future by providing oversight and adopting sound governance and financial management policies.



Paul Strasburg

Ahshua Bolton

Donna Chase

Chris Copeland

Sheryl Cohen

Gerry Fathauer

*"I joined the ESNT Board because I want to help this teaching, which has meant so much to me, find a permanent organizational home that allows it to expand to its full potential as a resource for the psychological and spiritual healing of the human race."*

**PAUL STRASBURG, Worthington, MA**

*"ESNT is a remarkable learning institution. It is also a community. Being a Board Member means working with like-minded people to spread the Narrative Tradition. In that context, I believe we have the capacity to change the world."*

**AHSHUA BOLTON, Bowling Green, KY**

*"Serving on the ESNT Board is an honor and privilege, a unique opportunity that calls forth putting into daily practice the teachings of the Enneagram, particularly those associated with mutual understanding, respect, appreciation, tolerance and compassionate support, for we are all stewards of the Narrative Tradition."*

**DONNA CHASE, Phoenix, AZ**

*"The teachings and faculty of ESNT brought new freedom and grace into my life in powerful ways. By serving on the Board, I am committed to building a strong organization that can offer this grace and freedom around the world now and for generations to come."*

**CHRIS COPELAND, Winston-Salem, NC**

*"Participating with this Board reminds me of the Margaret Mead quote, 'Never doubt that a thoughtful, committed group of citizens can change the world.' I'm privileged to be with like-minded folks who do what they like and what they're good at – a true example of synergy."*

**SHERYL COHEN, PHD, Cincinnati, OH**

*"My vision for ESNT is to retain the highest caliber of Enneagram training in all areas of the world. As stewards of the Narrative Tradition, ESNT bears witness to opening the individual to peace within, so that the world may someday know peace."*

**GERRY FATHAUER, Cleveland, OH**

The ESNT Core Faculty have a long-standing, collective experience unmatched in the field.



Helen Palmer  
*Co-Founder*



David Daniels, MD  
*Co-Founder*



Terry Saracino  
*Founding President*



Peter O'Hanrahan



Marion Gilbert



Renée Rosario



*Core Faculty Retreat with Executive Director Mary Jo Ruccio, Menlo Park, CA*

Each of us strives for spiritual, psychological and emotional freedom, both individually and as part of the larger community.



(L to R: Mary Jo Ruccio, Evangeline Welch, Pat O'Hanrahan, Allison DeHart and Elizabeth Elkins Newcomer (Not pictured: Barb Allgaier)

*"The Enneagram Narrative is my passion, so it is a daily privilege to work with the Core Faculty, the Staff, the Board and the broad Narrative Community to build a sustainable organization to grow the Narrative for future generations."*

**MARY JO RUCCIO, Executive Director**

*"I am deeply blessed to share my passion for the Enneagram in the Narrative Tradition through my daily work, and to be part of an intentional community that places a high value on walking our talk."*

**EVANGELINE WELCH, Marketing Director/Webmaster**

*"With appreciation for all the Enneagram has to offer, it's an honor to be part of the ESNT crew, and personally fulfilling to belong to a community that serves the mission of spreading this awareness and understanding, with caring and compassion, around the world."*

**PAT O'HANRAHAN, Database Manager**

*"I feel honored to have my position and to join with my colleagues to ensure these invaluable teachings continue to find their way into the world through the Narrative Tradition."*

**ALLISON DEHART, Administrative Assistant/Products Manager**

*"It is a joy and a pleasure working for Enneagram Studies in the Narrative Tradition, where the focus is on fostering kindness and compassion to oneself and others, thereby making the world a better place."*

**ELIZABETH ELKINS NEWCOMER, Social Media Manager**

*"It is fun and a blessing to work with an organization that truly embraces the wisdom of the Enneagram in its own practice, making it authentic in its mission to transform lives one person at a time."*

**BARB ALLGAIER, Registrar**

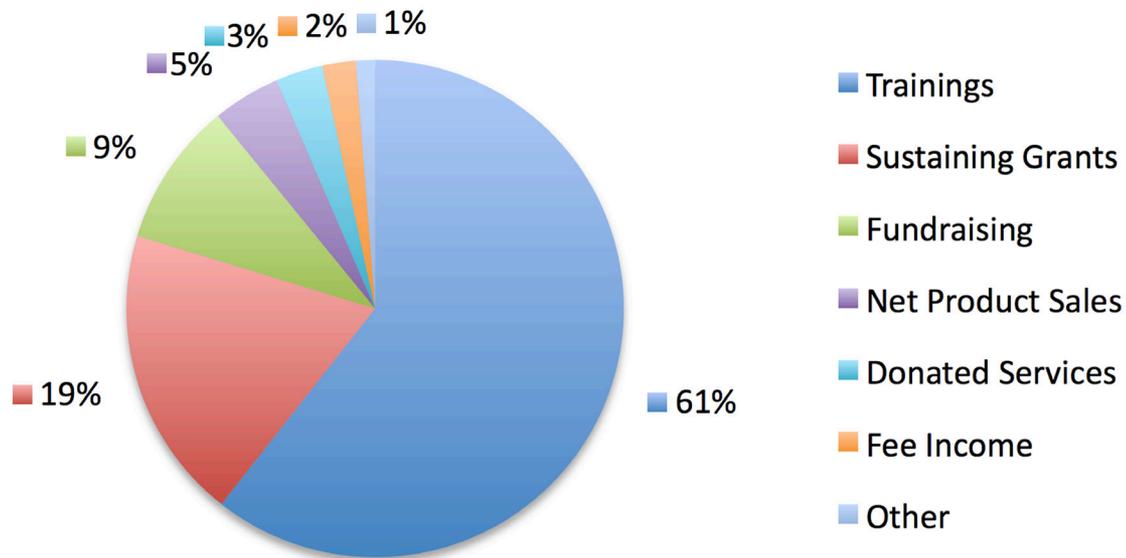
## Thank you 2015 donors!

Barb Allgaier  
Arizona Enneagram Association  
Tom Baldwin  
Boettcher Foundation  
Ahshua and Vincent Bolton  
Fred Boykin and Jack Killen  
Rick and Lesley Bradstreet  
John Brett  
Patricia Burbank and Michael Kilgroe  
Debbie Burditt  
Dale Casper  
Donna Chase  
Sheryl Cohen  
Chris Copeland  
Helen and Chris Cullander  
David Daniels  
John and Karen Daniels  
Allison DeHart  
Rhonda Diegel  
Enneagram Center of the Ohio Valley  
Elizabeth Elkins Newcomer  
Gerry Fathauer  
Fidelity Charitable Gift Fund  
Ruth Foster  
Margot Funke

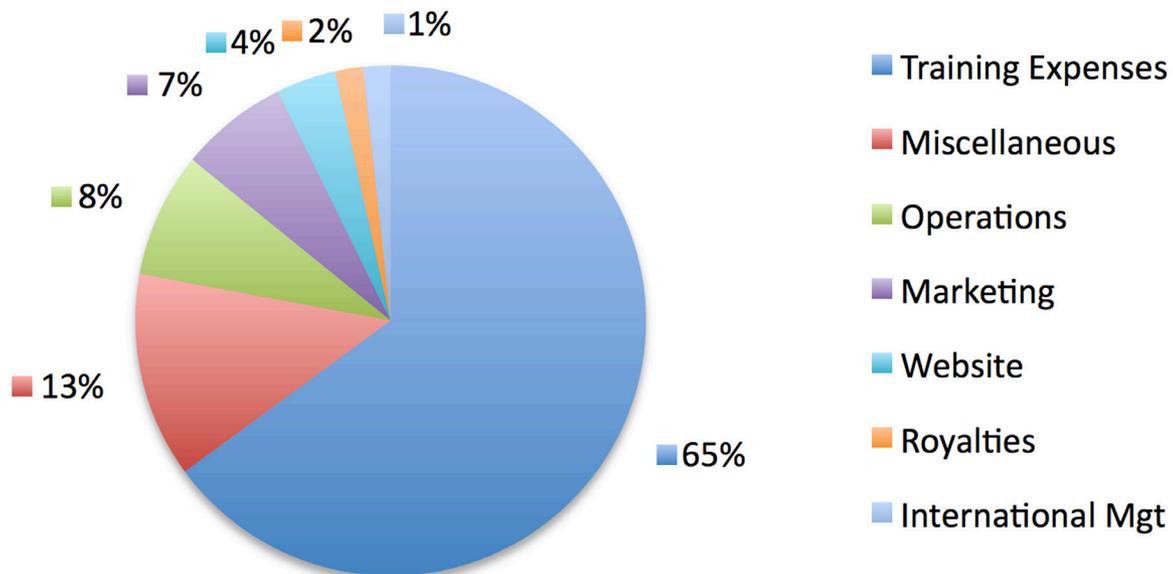
Marion Gilbert  
George Gordon  
Lorraine Hancock  
Leslie Hershberger  
Carol Jackson  
Scott Jamieson  
Sue Jones  
Elizabeth Krizer  
Jane Kroll  
Laurie Krotman  
Petra Lackey  
Jean Lapointe  
Steve Liggett  
Fernando Lopez  
Pat Martin  
JP McIvor  
Ronald Meyer  
Soraya Mittica Silva  
Marcia Muller  
Sandy and Gary Nearpass  
Kerry O'Donnell  
Peter and Pat O'Hanrahan  
Morgan Paris  
Adele and Gerry Phelan  
Joyce Plaza

Andrea Purcell  
Theresa Rembert  
Teresa Roche  
Renée Rosario  
Mary Jo Ruccio  
Terry Saracino  
William Schafer  
Nancy Shayeson  
Jo Anne Smith  
Curt Spear  
Kim Stege  
Paul Strasburg  
Christina Strauch  
Tod Tappert  
Transform Inc.  
Jan Turala  
Paul Van der Grift  
Martha Waters  
Janell Weber  
Evangeline Welch  
Diana West-Bourke  
Barbara Whiteside  
Daphne Whitman  
Sammylane Wirth  
Monirah Womack

## Total Income: \$732,285



## Total Expense: \$691,770



## Financial Statements

### Income Statement

Income	
Trainings	\$ 443,824
Sustaining Grants	\$ 139,997
Fundraising	\$ 68,682
Net Product Sales	\$ 32,243
Donated Services	\$ 22,500
Fee Income	\$ 15,976
Other	<u>\$ 9,063</u>
Total Income	\$ 732,285
Expenses	
Training Expenses	\$ 449,066
Operations	\$ 54,720
Marketing	\$ 47,386
Website	\$ 26,388
Royalties	\$ 12,100
International Mgt	\$ 12,000
Miscellaneous	<u>\$ 90,110</u> *
Total Expenses	\$ 691,770
Net Income	\$ 40,515

### Balance Sheet

Assets	
Cash	\$ 75,593
Inventory	\$ 10,523
Net Fixed Assets	\$ 61,928
Other Assets	<u>\$ 14,764</u>
Total Assets	\$ 162,808
Liabilities & Equity	
Current Liabilities	\$ 755
Equity	
Net Assets	\$ 121,538
Net Income	<u>\$ 40,515</u>
Total Equity	\$ 162,053
Total Liabilities & Equity	\$ 162,808

\*Includes Database, Credit Card Fees, Professional Fees, Travel & Other Expenses



ESNT is an educational nonprofit founded in 2011 to continue and expand the work started in 1988 by Helen Palmer and David Daniels, MD for generations to come. We are the primary worldwide trainer and supporter of individuals and organizations using the Narrative Tradition professionally and personally.

## Here's how your gift changes lives:

Currently, earned income (including tuition, fees and product sales) covers less than 75 percent of the cost of training and administrative support. To make up the difference, ESNT relies on tax-deductible contributions from people who value the impact this work is making in the world.

A total of **75 donors contributed an impressive \$68,682** in 2015 to support our programs and allow us to continue our mission. Through your financial support you will:

- Help people from all walks of life gain greater understanding and compassion for themselves and others.
- Help us train and certify teachers, professionals and emerging leaders who are committed to deep self-awareness and making a difference in the world.
- Enable us to expand our training programs and outreach efforts while keeping fees as low as possible.

Through our growing circle of more than 1,000 Certified Enneagram Teachers and Professionals in the Narrative Tradition, your gift will ripple out to impact thousands worldwide, **transforming lives and creating a more compassionate world, one person at a time.**



*A group of participants from Enneagram Intensive 2.0, Menlo Park, CA*



As an educational nonprofit, ESNT relies on sustaining grants and donations by individuals and organizations to help us provide long-term sustainability for our core curriculum of teachings and studies.

## Our 2016 fundraising goal: \$80,000

Please consider contributing today at [www.EnneagramWorldwide.com/donate/](http://www.EnneagramWorldwide.com/donate/), or send a check payable to “ESNT” to Executive Director Mary Jo Ruccio at 10809 Doral Court, Union, KY 41091.

Beyond sending a donation, there are several other direct ways to support us. You or your organization can:

- **Participate in our trainings and workshops.**  
Our Enneagram Narrative Curriculum’s rich, integrated structure makes it easy to find just the right programs for you. The heart of the curriculum is the Enneagram Narrative Core Program, free-standing and complete in itself for your own personal development, or the starting point if you want to become proficient as an Enneagram Narrative Teacher or apply the Enneagram Narrative in your professional work.
- **Refer colleagues, clients, friends and family to our programs.**  
Most of our participants come from direct one-to-one referrals.
- **Bring an Enneagram Narrative program to your community.**  
Our new Collaboration Initiative makes our teachings more accessible to people throughout the U.S. and Canada by partnering with Certified Teachers and other Enneagram enthusiasts to bring Enneagram Narrative Weekends to their local area. For more information, please contact Executive Director Mary Jo Ruccio at [mjruccio@enneagramworldwide.com](mailto:mjruccio@enneagramworldwide.com) or call 866-241-6162, ext. 702.
- **Shop on Amazon? Then support us and smile!**  
Each time you shop, 0.05 percent of your purchase price will be donated to ESNT. To get started, sign up now at <http://smile.amazon.com/ch/27-4376250>.

# 2015 ANNUAL REPORT



ENNEAGRAM STUDIES IN THE NARRATIVE TRADITION

[www.EnneagramWorldwide.com](http://www.EnneagramWorldwide.com)