



Andrews  University

---

## **Additional Report on Change of Control Andrews University- Griggs University**

**PREPARED FOR**

The Higher Learning Commission  
of the North Central Association  
of Colleges and Schools

**October 17, 2011**

## Table of Contents

---

<b>Introduction</b> .....	<b>3</b>
<b>Part One: The Transition</b> .....	<b>3</b>
Action in Support of Change of Control.....	3
Physical Move.....	4
Financial Impact of Move.....	4
Financial Status for Andrews University.....	5
Financial Status for Griggs University.....	5
Organizational Structure.....	5
Teaching and Learning.....	8
Strategic Planning.....	9
Assessment.....	9
Integration of Programs and Locations.....	10
<b>Part Two: Continued Fulfillment of NCA/HLC Accreditation Requirements</b> .....	<b>10</b>
1. Criterion One: Mission and Integrity.....	10
2. Criterion Two: Preparing for the Future.....	11
3. Criterion Three: Student Learning and Effective Teaching.....	12
4. Criterion Four: Acquisition, Discovery, and Application of Knowledge.....	13
5. Criterion Five: Engagement and Service.....	13
Continuation of Meeting Eligibility Requirements for Accreditation.....	14
<b>Appendix A—Curriculum Vitae</b> .....	<b>15</b>
Ethan Jones.....	17
Janine Lim.....	19
Lyn Bartlett.....	31
<b>Appendix B—Strategic Planning Process</b> .....	<b>35</b>
<b>Appendix C—Assessment Policy Statements</b> .....	<b>41</b>
<b>Appendix D—Assessment Process Map</b> .....	<b>45</b>
<b>Appendix E—Financial Status for Griggs University</b> .....	<b>47</b>
<b>Appendix F—Financial Status for Andrews University</b> .....	<b>71</b>

## Introduction

---

This report supplements the Andrews University “Application for Institutional Change of Control,” submitted to the Higher Learning Commission of North Central Association of Colleges and Schools, May 11, 2011. The first part of this document will reference progress in the transition of Griggs University to the campus of Andrews University and the resulting financial, structural, and teaching and learning issues impacted by the move. It will also review the next steps of the transition, particularly relating to strategic planning, assessment and the integration of Griggs University programs and locations to Andrews University programs and locations. The second part of the document will reference the Higher Learning Commission eligibility requirements for accreditation and criteria for accreditation, identifying any changes from the original application.

## Part One: The Transition

---

### Action in Support of Change of Control

At its June 23–24, 2011, meeting, the Higher Learning Commission Board of Trustees voted to approve the Change of Control of Griggs University to Andrews University. The action also recognized that the full transition would take a period of time as decisions on what programs would be accepted by Andrews University and, thereby moved under Andrews University accreditation, would have to follow a University review process. Similarly those courses that will not be accepted will need to “teach out” under the present DETC accreditation.

Since this action, the last few months have seen significant action on the physical move of Griggs University to Andrews University and the merging of systems, structures and operational processes. The University has also been visited by DETC to approve continued operation of the Griggs programs on the Andrews University campus during this transition. Processes have also been established for what will be the second phase of the transition: evaluation of each program and location where programs are delivered and whether they will be accepted by Andrews University or go into “teach out.” We envision that the second phase of the transition will take three years. After which, we will begin the third and final stage

when we anticipate that all processes, systems and remaining programs will be unified under Andrews University and its accreditations.

### **Physical Move**

In July 2011, Griggs University relocated to Andrews University and the new School of Distance Education opened its doors. As outlined in the Change of Control application, Andrews University bought a building already located on the campus of the University for that purpose. Half of the building was renovated for immediate occupation, including extending the campus network structures to provide support for employees in the building. The building was renamed Griggs Hall to maintain the Griggs identity. As envisaged, the building houses Griggs University operations during the transitional period, as well as functions related to the off-campus operation of Andrews University programs and delivery of courses and degrees through technology. All of these functions are managed through the School of Distance Education. The first phase of the move is therefore completed.

Currently, the dean and the associate dean for the School of Distance Education have been meeting with departmental faculties, sharing Griggs program requirements, course materials and teacher credentials. In areas such as business and religion, the review of Griggs materials is fully underway. The Off-Campus Programs Committee has initiated the process of reviewing Griggs University's off-campus commitments and a group of Andrews University faculty and administrators recently traveled to the first Griggs University international site. The second phase of the transition is therefore underway.

As outlined above, the third phase of our plan is the full integration of Griggs University into Andrews University. This will be completed after the completion of the full integration of Griggs University systems with the Andrews University systems, and when all Griggs University programs have been transferred and "teach out" of programs not transferred has been completed.

### **Financial Impact of Move**

The financial impact of the move has largely been in line with that projected in the Change of Control application.

## **Financial Status for Griggs University**

Appendix E shows the financial report for Griggs University for the fiscal year ended June 30, 2011. The financial operation for the year was a loss of \$36,907 compared to the prior year's gain of \$106,525. The budget was for a gain of \$10,417. For several years, Griggs University has made a slight gain or loss and the current year was a repeat of that pattern.

The budget for the current year is essentially a break-even plan with a gain for the year 2013. At this time, there is no reason to believe that the budget forecast will not be met.

As outlined in the Change of Control application, a budget of \$1,250,000 was allocated to cover transition costs. As of September 30, 2011, slightly more than \$1,050,000 has been spent for the transition which included \$477,000 for capital items and the remainder for salaries, benefits and general operations expenses. There are some ongoing transitional salaries and fringe benefits expenses and it is expected that the total transition cost will be slightly below the \$1,250,000 allocation.

## **Financial Status for Andrews University**

Also enclosed is the Audited Financial Statement for Andrews University for the 12 months ending April 30, 2011 (Appendix F). This statement shows an increase in net assets of \$7,305,000 for the year, of which \$5,308,000 was from unrestricted operations. Andrews University continues to be financially viable. The operating performance for the four months ended August 31, 2011, is \$831,000 better than budget and \$253,000 better than the prior year's four-month period. The enrollment for the current academic year is 3.8% more than budget. All indication at this point is that the University will have a profitable year and will be able to meet its budget.

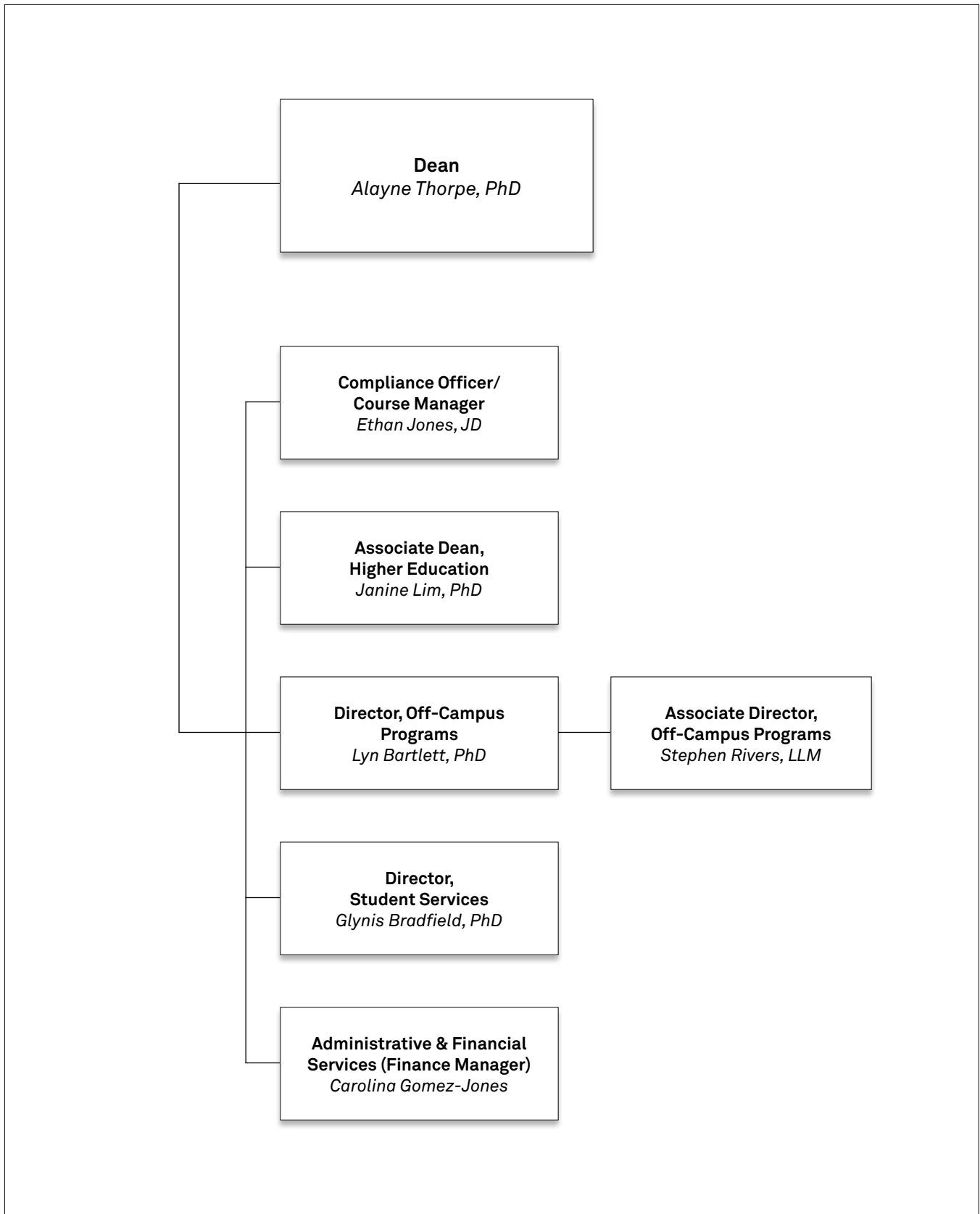
## **Organizational Structure**

After the physical move of Griggs University to the campus of Andrews University on July 1, 2011, and the HLC action on Change of Control, the School of Distance Education formally started its operations under its dean, Dr. Alayne Thorpe. As outlined on the following page, the School of Distance Education has assumed responsibility for all the operations and programs that existed under Griggs University, as well

as some responsibilities formally operated by other areas on campus. In particular, and as we proposed in our change of control application, the oversight of all Andrews University off-campus programs and locations has been moved to the School of Distance Education, along with DLiT, the campus Center for support of delivery of education through technology, especially online or blended learning. Under this arrangement, programs still offered under Griggs accreditation with DETC and those offered under Andrews University are both served from the School, although operational lines for the two remain distinct and will continue to do so, until they merge.

During the first few months of transition, the University realized that some adjustments in the initial structure of the School might be essential. With the move, over 60% of the staff are new, so significant training has been (and will continue to be) necessary. However, while the loss of staff created workforce challenges, it has also provided the opportunity for us to build a strong new administrative staff, trained not only to meet the present needs of Griggs University, but simultaneously schooled in Andrews University processes and procedures. With the addition of administrative personnel trained in distance education technology, along with a compliance officer, who has been trained as a lawyer, and both a director and assistant director for off-campus programs, the School of Distance Education is prepared to provide leadership and resources to support the campus.

The structure presently in place for the School of Distance Education is outlined below:



The curriculum vitae for the associate dean, the director of off-campus programs and the compliance officer can be found in Appendix A.

The relationships between the School of Distance Education and other campus entities are already strong and strengthening. Key personnel from the School of Distance Education are serving on a range of University committees: for example, General Education, Assessment, Undergraduate and Graduate Councils, Admissions, Spiritual Life, Strategic Planning. In addition, two campus-wide committees are driven from the School of Distance Education: the Off-Campus Programs Committee and the Distance Learning and Technology Committee. Both these committees involve faculty and administrators from across campus and are involved on both strategic and operational levels.

The operations of the School of Distance Education are also integrated in a range of operational ways with the rest of the campus. All activities related to records, admissions and marketing are housed centrally on campus. Where Griggs programs remain, staff members are being cross-trained to ensure separation of records and continuing service for students. However, as programs move across to Andrews University, this integration of staff will ensure seamless transfer. In addition, faculty from relevant academic departments and schools are engaged in approval of programs that are administered through the School of Distance Education. They will also be actively involved in review of remaining Griggs programs and deciding on whether they should be transferred or moved into “teach out.”

The structural integration is still in process and will continue to be a significant focus for the next few months.

### **Teaching and Learning**

The change of control has changed the teaching and learning environment at Andrews by introducing far more teaching at a distance, through a range of modalities. The associate dean of the School of Distance Education brings particular strength to the new team in this area, as her background has been in online education. Her professional strengths, combined with an increased team for technology training and course development, should eventually assist the campus in raising the bar on the quality of delivery of courses and programs using a range of technologies. Priorities in this area will become part of the strategic plan of the School of Distance Education and of the University as a whole.



## Strategic Planning

As identified in the Change of Control document, Andrews University is presently reviewing its strategic plan and by May 2012 will be launching a new five-year plan, which will be a five-year rolling plan, revised each year. The School of Distance Education will become central to the plan and is very engaged in the process. The University anticipates that one of the major strategic initiatives will focus on the Andrews University national and international footprint, taking into account the needs of the Seventh-day Adventist Church, the strengths of the University and the expectations from NCA/HLC in operation of such programs. We anticipate that this will be one of the strengths of the University.

## Assessment

Over the past two years Andrews University has placed significant focus on improvement of its assessment processes. Some of the new initiatives were outlined in the Change of Control application. Others are mentioned in Part Two of this report. In relation to Andrews' off-campus programs, the Office of Institutional Assessment is working with departments and the School of Distance Education to determine how best to organize the assessment processes of off-campus programs in Weave, our assessment management program, in order to most efficiently use available personnel. Additionally, work is being done to identify key learning outcomes for each program, and unique variations for degree programs offered in distinct contexts. The director of Institutional Assessment has been meeting weekly with the dean of the School of Distance Education to work out other informational needs and assessment related details for an efficient merger and continued accreditation compliance.

Andrews continues to have a process for the approval of new online courses. A modified review process has been developed to approve existing Griggs courses and programs. Once merged into Andrews' operations, programs will be scheduled for regular program review every seven years along with on-campus programs. Another assessment initiative scheduled for this year is the review and revision of the current course evaluation form, and the selection and purchase of course evaluation software that will allow us to better analyze our courses on- and off-campus.

## Integration of Programs and Locations

While considerable work remains in reviewing Griggs University programs, the process has begun. Currently, the dean for the School of Distance Education and the associate dean for higher education have been meeting with departmental faculties, sharing Griggs program requirements, course materials and teacher credentials. In areas such as business and religion, the review of Griggs materials is now underway. The Off-Campus Programs Committee has initiated the process of reviewing Griggs University's off-campus commitments and a group of Andrews University faculty and administrators recently traveled to the first Griggs University international site.

## Part Two: Continued Fulfillment of NCA/HLC Accreditation Requirements

Four months after the Higher Learning Commission voted change of control, very little has changed from the information submitted in the Change of Control Self-Study as it relates to continued fulfillment of NCA/HLC accreditation requirements. Each criteria will be identified below along with an indication of whether the status is the same as in the May report, or if there is any additional information to share with the team.

### 1. Criterion One: Mission and Integrity

- a. **Core Component 1a:** *The organization's mission documents are clear and articulate publicly the organization's commitments*

No change. The mission of Andrews University and its commitments remain unchanged with the merger, although the footprint of the campus in responding to that mission has extended. The programs not presently under the umbrella of Andrews University continue under the mission statement of Griggs University until the point of transfer. However, as noted in the Change of Control document the two missions are compatible.

- b. **Core Component 1b:** *In its mission documents, the organization recognizes the diversity of its learners, other constituencies and the greater society it serves*

No change.

- c. **Core Component 1c:** *Understanding of and support for the mission pervade the organization*

As a result of the physical move of Griggs University from Maryland to Michigan a high number of new staff and faculty have been hired at Andrews University to ensure continued quality management

and delivery of the Griggs University programs. Both those that did move to Andrews University and those who are new to both Griggs and Andrews have gone through training on campus. This included orientation to the Andrews University mission as well as training in professional skills. Faculty and administrators joined the Andrews University new faculty orientation for three days in August; this assisted with the integration of faculty largely serving the School of Distance Education with faculty in other campus areas. Focus throughout has been on ensuring that all individuals both understand and support the Andrews University mission.

- d. **Core Component 1d:** *The organization's governance and administrative structures promote effective leadership and support collaborative processes that enable the institution to fulfill its mission*

The Andrews University governance and administrative structures have not changed. However, as anticipated in the Change of Control application, the dean of the School of Distance Education now sits on Deans' Council and is fully integrated into the administrative structures of Andrews University. Faculty and staff of the new School of Distance Education are also represented on all relevant committees at undergraduate and graduate levels. The Off-Campus Programs Committee is one example of a committee that is highly collaborative and has been impacted by the Change of Control. The provost now chairs the committee and the executive secretary is the dean of the School of Distance Education. This committee will be responsible for ensuring that all off-campus delivery at Andrews University supports the institutional mission as well as for monitoring quality processes and ensuring all correct approvals are in place. Deans and faculty from across the University are members of the committee. This committee will take a key role in considering the appropriateness of the transfer of existing Griggs University programs to Andrews University, a process that is already underway.

- e. **Core Component 1e:** *The organization upholds and protects its integrity*

No change.

## 2. **Criterion Two: Preparing for the Future**

- a. **Core Component 2a:** *The organization realistically prepares for a future shaped by multiple societal and economic trends*

As identified in the Change of Control application, Andrews University is presently in the process of developing a new strategic plan that will be a five-year rolling plan. This process involves multiple participants, and every campus department and school has been asked to participate in the process of identifying future areas for growth and development for the campus. Campus discussions to date indicate that one of the major strategic initiatives in the next five years will relate to the positioning of Andrews University beyond the boundaries of its campus. The University recognizes that the gift of Griggs University to the campus provides a great opportunity for increased professionalism in off-campus programs and their delivery. It also requires continued monitoring related to mission-effectiveness and quality. This will feature in the plan.

- b. **Core Component 2b:** *The organization's resource base supports its educational programs and its plans for maintaining and strengthening their quality in the future*

No change.

- c. **Core Component 2c:** *The organization's ongoing evaluation and assessment processes provide reliable evidence of institutional effectiveness that clearly informs strategies for continuous improvement*

Progress continues on managing evaluation and assessment processes. A Key Performance Indicators table is being developed: this will show five years of data that will be updated each year, in order to inform the strategic planning process for continuous improvement. The latest document to be approved is a process map for assessment (Appendix A). A policy statement is also in its last stages of approval (Appendix B). These documents will impact the School of Distance Education as with every other school.

- d. **Core Component 2d:** *All levels of planning align with the University's mission, thereby enhancing its capacity to fulfill that mission*

At this stage in the current strategic planning process, seven strategic pillars have been chosen to drive the planning process and serve as the accountability pillars for an institutional dashboard: Quality, Faith Commitment, Service, Community, Growth, Financial Resilience and Accountability. All strategic plans will need to reference these ideals, as well as being rooted in the mission statement of the university. Appendix C outlines how the University views the integral nature of the institutional mission to the strategic pillars and the pillars to the strategic initiatives and action plans.

### 3. Criterion Three: Student Learning and Effective Teaching

- a. **Core Component 3a:** *The organization's goals for student learning outcomes are clearly stated for each educational program and make effective assessment possible*

Individual coaching of assessment processes at the departmental level continues. Now that Griggs and its new administrative personnel have settled at Andrews, there has been renewed emphasis on bringing off-campus programs more firmly under the University assessment umbrella.

- b. **Core Component 3b:** *The organization values and supports effective teaching*

During the 2011–12 academic year, three series of seminars will support teaching on campus. The Effective Learning Council will run a series of workshops focusing on critical thinking. One of those will be taught by one of the new faculty in the School of Distance Education and will focus on critical thinking in the online environment. The second series will focus on integration of faith in teaching. The third series will continue to provide tools for faculty to engage in online or blended teaching. Plans are also in place for developing a Faculty Institute that will serve as an umbrella for the various initiatives identified above, as well as providing a series of workshops for all faculty at the commencement of each academic year.

- c. **Core Component 3c:** *The organization creates effective learning environments*

The new Buller Hall, part of the Undergraduate Learning Center, is now open. As identified earlier in this document, Griggs Hall has now also opened and houses the new School of Distance Education.

- d. **Core Component 3d:** *The organization's learning resources support student learning and effective teaching*

No change.

#### 4. Criterion Four: Acquisition, Discovery, and Application of Knowledge

- a. **Core Component 4a:** *The organization demonstrates, through the action of its board, administrators, students, faculty and staff that it values a life of learning*

One of the major strategic initiatives in our next strategic plan will be on Andrews University becoming a “reflective learning community.”

- b. **Core Component 4b:** *The organization demonstrates that acquisition of a breadth of knowledge and skills and the exercise of intellectual inquiry are integral to its educational programs.*

No change.

- c. **Core Component 4c:** *The organization assesses the usefulness of its curricula to students who will work in a global, diverse and technological society*

No change.

- d. **Core Component 4d:** *The organization provides support to ensure that faculty, students, and staff acquire, discover, and apply knowledge responsibly*

No change.

#### 5. Criterion Five: Engagement and Service

- a. **Core Component 5a:** *The organization learns from the constituencies it serves and analyzes its capacity to serve their needs and expectations*

Andrews University seeks to listen to its various constituencies. One significant group is the Seventh-day Adventist world church leaders. In the first week of October, the president and provost met with 15 of the key leaders from each part of the world where Andrews University offers programs and where Griggs University programs have operated. They were asked to interact on what was happening and how they would like Andrews University to be involved in their future. Their responses will play an important part in the review of what Griggs University programs transfer to Andrews University. This is an example of the communication between the University and its constituencies that impacts the transition.

- b. **Core Component 5b:** *The organization has the capacity and the commitment to engage with its identified constituencies and communities*

As identified in the first part of this report, the School of Distance Education has been staffed with a range of professionals with particular experience in working internationally and using distance technologies. This will considerably strengthen the capacity of Andrews University to engage with its off-campus communities, which will in turn support the longstanding commitment of Andrews University to international education.

- c. **Core Component 5c:** *The organization demonstrates its responsiveness to those constituencies that depend on it for service*

No change.

d. **Core Component 5d:** *Internal and external constituencies value the services the organization provides*

No change.

### **Continuation of Meeting Eligibility Requirements for Accreditation**

This document and the Change of Control application together provide evidence that with this change of control Andrews will continue to meet the Eligibility Requirements and Criteria for Accreditation. The mission remains consistent with the operation of the University. Financial viability has been maintained. Andrews' policies and processes will continue to manage the change, the remaining transition and any changeover of ownership of programs. Through the management of the change process, some of the challenges identified during the most recent NCA/HLC visit will be addressed, in particular the increased oversight of off-campus programs, staffing for affiliations and extensions, and the expansion of online programming. In addition, the increased focus on assessment throughout the campus will include a more structured and unified approach to assessment and planning for off-campus delivery of degrees.







# ETHAN E. JONES

6645 Steeplechase Lane  
Berrien Springs, Michigan 49103

[ethanj@andrews.edu](mailto:ethanj@andrews.edu)  
(484) 948-5717

## PROFESSIONAL EXPERIENCE

### **Andrews University, School of Distance Education**

**Berrien Springs, Michigan**

*Compliance Officer; Course Manager*

*August 2011–present*

*Compliance Officer:*

- Ensure compliance with constitutional and statutory requirements pertaining to online and distance learning;
- Review contracts and working agreements with international and domestic affiliate and extension programs;
- Ensure that international affiliate and extension programs are organized and conducted in compliance with guidelines and procedures set by local governments;
- Provide support to the Dean of the School of Distance Education regarding intellectual property, contractual, and other general legal matters.

*Course Manager:*

- Oversee the maintenance, revision and creation of courses offered by the School of Distance Education and Griggs International Academy;
- Select and contract with professors to create new or revised courses; oversee editing and implementation of the newly developed courses;
- Chair the Course Production Committee, reviewing the current state of coursework, expanding online course availability, improving and modernizing coursework;
- Serve on various University committees, as assigned.

### **Griggs University**

**Silver Spring, Maryland**

*English Instructor*

*February 2011–present*

Online instructor for English literature.

- Evaluate and grade student assignments and exams;
- Provide academic support and tutoring.

### **Eastern University**

**St. Davids, Pennsylvania**

*Adjunct English Instructor*

*September 2006–June 2011*

Adjunct English instructor for several different courses at Eastern University's affiliate programs, People For People Institute, Eastern in the City, and Esperanza College.

- Taught writing and literature for first-year college students, with emphasis on critical response to literary texts as a way of developing student writing skills and critical analysis;
- Taught English as a second language courses for first-year college students;
- Taught rhetorical methods;
- Taught contemporary grammar

### **Linguistic Data Consortium**

**Philadelphia, Pennsylvania**

*Intellectual Property Rights Legal Researcher*

*October 2010–January 2011*

Intellectual property rights legal research for academic research project, housed at the University of Pennsylvania.

- Review media data for potential copyright infringement and violation of terms of use;
- Obtain copyright clearances;
- Assist in policy creation.

**SAP, Americas**

*Legal Intern*

**Newtown Square, Pennsylvania**

*August 2009–February 2010*

Gained transactional and IP litigation experience as an intern for the legal department of a global software corporation with more than 47,000 employees in 50 countries.

- Researched and drafted memos on a wide variety of topics, including analysis of the impact on company policy of recent Supreme Court rulings regarding patents and the interplay between indemnification clauses and patent infringement under Pennsylvania state regulations;
- Drafted and revised live software and service licensing agreements and settlement letters;
- Observed negotiation meetings with clients, as well as committee meetings and depositions.

**Pennsylvanians for Modern Courts**

*Legal Intern*

**Philadelphia, Pennsylvania**

*June 2008–November 2008*

Worked as an intern for nonprofit, nonpartisan organization dedicated to reformation of the court system in Pennsylvania by changing the judicial selection process, improving court administration, and promoting diversity and the elimination of bias.

- Researched and analyzed existing regulations, legal precedent in case law, and policy trends to prepare analysis and advocacy writings in support of court reform in Pennsylvania;
- Drafted entries for and maintained weblog (blog) regarding the advantages of proposed reforms, the weaknesses of the current system, and issues of campaign finance;
- Researched and drafted policy analysis briefs concerning the impact of recent cases involving campaign finance issues on judicial elections in Pennsylvania;
- Prepared and edited the organization’s annual report, detailing developments over the year and listing sponsors and supporters.

**Pine Forge Academy**

*English Instructor/Chairman, English Department*

**Pine Forge, Pennsylvania**

*January 2003–June 2006*

Taught English and acted as Chairman of the English Department (August 2004 through June 2006).

- Responsible for developing and monitoring curriculum for and taught English program for grades 9–12, including instruction in grammar, composition, and American and British Literature;
- Served on the Curriculum Committee and acted as National Honors Society faculty advisor;
- Responsible for student mentoring and assessment, as well as tutoring for special needs students.

**EDUCATION**

**Drexel University – Earle Mack School of Law**

*Juris Doctor*

**Philadelphia, Pennsylvania**

*May 2010*

**Katholieke Universiteit Leuven**

*M.A. in Philosophy (cum laude)*

**Leuven, Belgium**

*September 2002*

**Katholieke Universiteit Leuven**

*B.A. in Philosophy (cum laude)*

**Leuven, Belgium**

*June 2000*

**Andrews University**

*B.A. English, B.A. Spanish (cum laude)*

**Berrien Springs, Michigan**

*August 1999*

---

---

# Janine Lim, Ph.D.

## Vitae

---

---

10745 Concord Drive  
Berrien Springs, MI 49103  
Work Phone: (269) 471-6546  
E-mail: [janine@andrews.edu](mailto:janine@andrews.edu)  
Web: [www.janinelim.com](http://www.janinelim.com)

### Education

- Ph.D.**, Leadership, Andrews University                      May 2010
- M.A.T.**, Secondary Level, Andrews University              June 1996  
Michigan Secondary Teaching Certification  
Michigan Reading Endorsement, K-12  
SDA Basic Certification
- B.A.** Communication, Andrews University                      June 1995  
Minor, Reading  
Minor, Religion

### Professional Experience

- Associate Dean, Higher Education**, *Andrews University*, 2011-present  
Coordinate higher education courses in the School of Distance Education  
Assist faculty with instructional design of online courses and programs
- Instructional Technology Consultant**, *Berrien RESA*, 1998-2011  
Coordinate distance learning for two counties including 20 school districts  
Teach graduate level technology integration classes online  
Assist colleagues with training for teachers on technology integration
- Instructional Technologist**, *Berrien County ISD*, Berrien Springs, MI 1997-1998  
Trained teachers in using technology in the classroom
- Teacher**, *Griswold Christian Academy*, Worthington, OH 1996-1997  
Taught grades 5-10 language arts and Bible

### Professional Memberships

- American Educational Research Association (2009-present)  
International Society for Technology in Education (2001-present)  
Michigan Association of Computer Users in Learning (1997-present)  
United States Distance Learning Association (2008-2010)

## *Adjunct Faculty Experience*

**Distance education courses** for graduate credit through these organizations:  
(6-12 graduate credits annually 1999-2011)

*Berrien RESA* courses offered for credit through Andrews University, Grand Valley State University, and Western Michigan University

*Adventist Virtual Learning Network* courses offered for credit through Andrews University and La Sierra University

*MACUL ATA Academy* courses offered for credit through Central Michigan University and Western Michigan University

### **Distance education courses taught:**

123 VC: Jazzing Up Your Curriculum with Videoconferencing (a three-country, eight-state, live, collaborative, graduate credit level workshop)

21<sup>st</sup> Century Communication Collaborations

Active Online Teaching

Active Online Courses

Developing WebQuests (Exemplary WebCT Course 2000)

Kid2Kid Videoconference Connections

Integrating Technology in Pathways Part 1

Integrating Technology in the Curriculum

Internet in the Curriculum

Internet Research and Projects

Planning Interactive Curriculum Connections

Supporting Teachers' Use of Videoconferencing

Technology in the Early Elementary Classroom

Technology Tools for Literacy

### **Other Courses Taught**

Computer Aided Instruction, taught a four credit course for Andrews University  
Spring, 1998

## *Professional Service*

### **Non Profit Board Service**

#### ***TWICE: Two Way Interactive Connections in Education***

Consultant Board Member (2011-2012)

President-Elect (2010-2011)

Vice President (2006-2007)

Conference Committee Chair (2005-2006)

Projects Committee Chair (2005-2010)

President (2004-2005)

Vice President (2002-2004)

Co-founder and co-chair (2001-2002)

#### ***AVLN: Adventist Virtual Learning Network***

2006 Online Conference Chair

2005 Online Conference Chair

Online Course Committee Chair (2002-present)

Webmaster (June 2002-present)  
Board member (2001-present)

**MACUL: Michigan Association of Computer Users in Learning**

Board Member (2001-2003)  
Featured Speaker Chair and Online Services Chair (2002-2003)

**Invitational Keynotes**

*Keynote: The Power of Collaboration, Instructional Design for Teaching via eLearning Kick Off, Kearney, NE, Feb. 11, 2009*

*Keynote: Kids Do the Coolest Codec Things! Alberta Broadband Summer Institute, Canmore, Alberta, Canada, Aug. 14, 2006*

**Invited Service Presentations and Workshops**

Andrews University Leadership Research Bootcamp, Miami, FL, Feb. 7-11, 2011

- o *Assisted students with coding and analyzing data in SPSS*
- o *Assisted professors with answering dissertation student questions*

Schools Videoconference User Event, The Royal Society, London, UK, November 22, 2010

- o *Increasing Use of Curriculum Videoconferencing: Recent International Research*

Kansas Association of Interactive Distance Education, October 25, 2010

- o *Enriching Your Curriculum with Videoconferencing*

International Shadowing by Graseham Extended Services Staff from Kent County, England, May 20, 2009

- o *Two staff came to visit my program and shadow me to learn about our videoconference program*

Tech-It-Up International: Bringing Technology to the Classroom, Kamloops, BC, October 22-24, 2009

- o *Designing Quality Interactive Classroom Projects for Videoconferencing*
- o *Enriching Your Curriculum with Interactive Videoconferencing*

Macomb Intermediate School District Summer Technology Academy, Clinton Township, MI, August 17-18, 2009

- o *The World is Your Classroom: Getting the Most Out of Your Distance Learning Experience*

REMC Instructional Technology Specialists Meeting, September 12, 2008

- o *Designing Online Professional Development, co-presenter*

Leadership Regional Group Invited LiveText Workshop, October 19, 2008

Elevate 2008, Invited Conference Workshop, Canmore, Alberta, August 26-27, 2008

- o *Designing Quality Videoconference Projects*

- Alberta Broadband Summer Institute, invited remote presenter, August 21, 2007
- o *Issues in Integrating Videoconferencing in the Curriculum*
  - o *Selecting Curriculum Based Programs*
- North Carolina School of Science and Mathematics, August 7, 2007
- o *Panel Discussion on Videoconferencing*
- North American Division Technology Directors' Meeting, January 30, 2007
- o *New Trends and Tools in Educational Technology*
- Andrews University Leadership Roundtable Conference, July 17, 2007
- o *Web 2.0: Discover the Power of the Read/Write Web*
- North American Division Teachers' Convention, Nashville, TN, August 6-9, 2006
- o *Website Evaluation: Teaching Students to Think*
  - o *Videoconferencing: Discover the Possibilities*
  - o *Best Tools for Technology Integration*
  - o *The Read/Write Web: Blogs, Wikis, and MySpace. What Should a Teacher Do?*
- 2006 Adventist Virtual Learning Network Online Conference, June 19-22, 2006
- o Conference co-chair for first AVLN bilingual (Spanish/English) online conference and first Adventist Megaconference.
  - o *Technology Tools for Collaboration*
- Workshop sessions for Universidad de Montemorelos, Mexico. June 30-31, 2005
- o *Structures for Online Courses*
  - o *Best Tools for Technology Integration*
  - o *Creating Online Student Activities*
  - o *Website Evaluation: Teaching Students to Think*
  - o *Classroom Projects with Microsoft Word*
- Wisconsin Reading Association, February 3, 2005, *Enriching Your Curriculum with Videoconferencing.*
- 2005 Online Adventist Virtual Learning Network Conference May 9-12, 2005
- o Coordinated AVLN's first online conference.
  - o *AVLN Course Showcase*
  - o *Structures for Online Courses*
- Adventist Virtual Learning Network Conference, Pacific Union College, July 1-2, 2004
- o *Classroom Projects with Excel*
  - o *Best Tools for Technology Integration*
  - o *Classroom Projects with Word and Inspiration*
  - o *Technology and the Early Elementary Classroom*
  - o *Website Evaluation: Teaching Students to Think*
  - o *The One Computer Classroom*
  - o *Creating Online Student Activities*
- Governor's Wisconsin Educational Technology Conference Wisconsin, Oct. 23, 2003

- o *Finding Video Conference Field Trips*

Online Course Training for BCISD Consultants, August 15 & 25, 2003

ATA Technology Academy Workshop Coordinator, July 28 - August 1, 2003

Adventist Virtual Learning Network Conference, Canadian University College, June 30 - July 2, 2003

- o *Finding and Keeping Track of Online Resources*
- o *What is Technology Integration?*
- o *Classroom Projects with PowerPoint*
- o *Structuring and Guiding Student Research Online*
- o *Excel Projects*
- o *Classroom Writing Projects with Word and Inspiration*
- o *Internet Projects and Filamentality: Creating Online Student Activities*
- o *Copyright, Ethics, and Assessment*

Calhoun ISD Technology Conference, June 23, 2003

- o *Videoconferencing: Discover the Possibilities!*

Western Michigan University Educational Technology Coordinators Conference

- o *Planning and Maximizing Your Distance Learning Program, May 1, 2003*

Technology Integration Workshops, August 5 through 16, 2002

- o Two weeks of training for teachers in the British Columbia Conference of Seventh-day Adventists.

Ameritech Technology Academy Trainer, July 29-30, 2002; Workshop Coordinator, August 1-2, 2002

Adventist Virtual Learning Network Conference, Southern Adventist University, June 23-28, 2002

- o *Easy Internet Activities*
- o *Jigsaws & Online Communication*
- o *Structures for Online Courses*
- o *WebQuests*

Ameritech Technology Academy Trainer, July 16-August 9, 2001

Distance Learning Conference 2001, La Sierra University, June 17-22, 2001

- o Served on the conference planning committee.
- o *Making Web Activities for K-12 Classroom*
- o *Team taught three day workshop on Course Development*

Adventist Virtual Learning Network Active Learning in Distance Education Conference June 25-30, 2000

- o *Interactive Video Conferencing: K-12*
- o *Interactive Video Conferencing: Higher Education*
- o *Creating WebQuests*

Millersport Elementary School, Millersport, Ohio Aug. 19-20, 1999

- o *Integrating the Internet into the Elementary Curriculum*
- o *Curriculum Projects with ClarisWorks and KidPix Studio*

Andrews University Leadership Conference, July 20, 1999  
 o *Introduction to WebCT*

Andrews University Leadership Conference, July 12-14, 1999  
 o *Seminar in Technology: WebCT*

Regional Educational Media Centers Association Meeting, June 15, 1999  
 o Co-presented with 3 other Michigan consultants, *Technology Staff Development*

Michigan Seventh-day Adventist's Teachers Inservice, Lansing, MI, March 1, 1999  
 o *The One Computer Classroom*

Southwest Michigan Title 1 Conference Oct. 26-27, 1998  
 o *The One Computer Classroom*  
 o *Kids Software for Parents*

Andrews University Leadership Conference, July 19, 1998  
 o *Dissertations and WordPerfect*

Pioneer Memorial Church 1997-1998  
 o *Introduction to Surfing the Internet*, Three 8-week sessions

Lake Union Teachers' Convention, Andrews University August 19, 1997  
 o *Using the Internet in Social Studies and Language Arts*

World Wide Web section of Classroom's Alive! July 1996, 1997

Andrews University Leadership Conference: July 18, 1997 *Web Page Development*

#### **Refereed Research Conference Presentations**

American Educational Research Association, New Orleans, LA, April 11, 2011  
 o *A Construct Validity Estimate of the K12 Curriculum Videoconferencing Implementation Scale*

American Educational Research Association, Denver, CO, May 4, 2010  
 o *A Quantitative Analysis of Variables That Predict Usage of Curriculum Videoconferencing*

American Educational Research Association: SIG Research on Women in Education, Oct. 22-23, 1998  
 o *Mothers as Subtle Mentors*, Co-presenter

#### **Refereed Professional Conference Presentations**

International Society for Technology in Education, Philadelphia, PA; June 26-29, 2011  
 2011 MI, March 16-18, 2011  
 o *Building Digital Age Communication and Collaboration Skills with Videoconferencing*



- o *Collaborations around the Planet: Social Networking for Educational Videoconferencing*
- o *Interactive Videoconferencing Playground Planning Team*
- o *Lest We Forget: Interview War Veterans via Videoconference*
- o *Read Around the Planet: A Videoconference Celebration of Reading*

Michigan Association of Computer Users in Learning Conference, Grand Rapids, MI, March 16-18, 2011

- o *21st Century Visual Communication with TWICE*

Midwest Education Technology Conference, St. Charles, MO, February 15, 2011

- o *Inspiring Teachers' Use of Curriculum Videoconferencing*

Michigan Association of Computer Users in Learning Conference, Grand Rapids, MI, March 10-12, 2010

- o *Instructional Strategies That Work With Videoconferencing: Interactive Global Collaborations*

ESC Region XI Distance Learning Educator Conference, October 13, 2010

- o *Solving the Exploding Collaboration Problem*

International Society for Technology in Education, Denver, CO; June 27 - July 1, 2010

- o *SIG IVC Special Interest Group for Videoconferencing Playground Committee Member*

Michigan Association of Computer Users in Learning Conference, Grand Rapids, MI, March 18-20, 2009

- o *Monster Match: A Descriptive Writing Collaboration*
- o *Instructional Strategies That Work with Videoconferencing: Interactive Global Collaborations*
- o *Reducing Your Transportation Budget Using Videoconferencing*

Midwest Education Technology Conference, St. Charles, MO, February 10, 2010

- o *Read Around the Planet and Other Collaborations*

K12 Online Conference, December 8, 2009

- o *Instructional Strategies That Work with Videoconferencing: Increasing Interactivity*

ESC Region XI Distance Learning Educator Conference, October 14, 2009

- o *Increasing Use of Curriculum Videoconferencing: Recent International Research*
- o *Instructional Strategies That Work with Videoconferencing*

Texas Distance Learning Association, Corpus Christi, TX, April 5-7, 2009

- o *Designing Quality Videoconference Projects Hands-On Workshop*
- o *Share and Hear Stories of Read Around the Planet*

Michigan Association of Computer Users in Learning Conference, Detroit, MI, March 18-20, 2009

- *Collaborations Around the Planet and Read Around the Planet*
- ETech Ohio Conference, February 2, 2009
  - *Collaborations Around the Planet and Read Around the Planet*
- Megaconference, A Global Videoconference Conference, October 27, 2008
  - *Read Around the Planet*
- ESC Region XI Distance Learning Educator Conference, October 15, 2008
  - *Read Around the Planet and Collaborations Around the Planet*
- National Educational Computing Conference, San Antonio, TX, June 29-July 2, 2008
  - *Designing Quality Interactive Classroom Projects for Videoconferencing All Day Workshop*
  - *Collaborations Around the Planet: Social Networking for Educational Videoconferencing*
- Texas Distance Learning Association, Galveston, TX, March 24-27, 2008
  - *Show, Don't Tell: A New Professional Development Model*, co-presenter
  - *Collaborations Around the Planet*
- Michigan Association of Computer Users in Learning Conference, Grand Rapids, MI March 3-7, 2008
  - *Collaborations Around the Planet: Social Networking for Educational Videoconferencing*
- Connecting and Collaborating Conference, Clinton Township, MI, November 12, 2007
  - *Collaborations Around the Planet*
- Center for Interactive Learning and Collaboration Symposium, Indianapolis, IN, November 13-14, 2007
  - *Issues and Challenges Panel*
- National Educational Computing Conference, Atlanta, GA, July 5-7, 2007
  - *Remote Workshop Presenter: Designing Quality Videoconference Projects*
  - *Rated Best of the Best NECC Workshop*
- Megaconference, A Global Videoconference Conference, November 7, 2007
  - *Read Around the Planet*
- ESC Region XI Distance Learning Educator Conference, October 17, 2007
  - *Collaborations Around the Planet: Social Networking for Educational Videoconferencing*
- Michigan Association of Computer Users in Learning Conference, March 14-17, Detroit, MI, 2007
  - *Read Around the Planet: Celebrate Reading!*
  - *Collaborations Around the Planet Hands-On Session*
- Megaconference, A Global Videoconference Conference, October 24, 2006

- o *Read Around the Planet with connection to Taiwan*

Adventist Virtual Learning Network Online Conference, June 19-22, 2006

- o *Conference Co-Chair for first AVLN bilingual (Spanish/English) online conference*
- o *First Adventist Megaconference via videoconference*

National Educational Computing Conference, San Diego, California, July 5-7, 2006

- o *Designing Quality Interactive Classroom Projects for Videoconferencing All Day Workshop*
- o *Authors, Guest Speakers, and Internaional Connections: Videoconferencing for Learning*
- o *Designing Quality Interactive Classroom Projects for Videoconferencing Break Out Session*

Michigan Association of Computer Users in Learning Conference, March 8-10, Grand Rapids, MI, 2006

Keystone Conference, Indianapolis, IN. October 3-5, 2005

- o *Issues in Integrating Videoconferencing in the Classroom*

Michigan Association of Computer Users in Learning Conference March 16-18, 2005

- o *Presented Pre-Conference Workshop with Debbie Glasgow, Ignite Learning with Interactive Videoconferencing*
- o *Facilitated Great Videoconferencing Programs Around Michigan*

Keystone Conference, Indianapolis, IN. October 25-26, 2004

- o *Served on the Steering and Outreach Committees.*
- o *Invited: National Overview: Videoconferencing in the Classroom.*
- o *TWICE Kids do the Coolest Codec Things.*

National Educational Computing Conference, Philadelphia, PA, June 23, 2004

- o *Bridging Distances with Videoconferencing in K-12 Classrooms*

Michigan Association of Computer Users in Learning Conference Mar. 10-12, 2004

- o *Inspiring Real World Connections with Kids, Preconference Workshop*
- o *Kids Do the Coolest CODEC Things!*

Megaconference V, a worldwide videoconference conference, December 10, 2003

- o *MysteryQuest, a unique geography videoconference.*

Michigan Institute Educational Management Conference, November 21, 2003

- o *Kids Connections via Videoconference*

Michigan Institute Educational Management Conference, November 21, 2002

- o *MysteryQuest: A Unique Geography Videoconference*

4th Annual Educational Technology Coordinators Conference, April 26-27, 2001

- o *Connecting and Learning*
- o *How to Support Videoconferencing in Your District*

- Michigan Association of Computer Users in Learning March 9, 2000
  - o *Video Conferencing: Discover the Possibilities!*
- North American Division Teachers Convention, Aug. 14-16, 2000
  - o *The One Computer Classroom*
- Michigan Association of Computer Users in Learning March 9, 2000
  - o *Two Methods for Technology Academies*
- Michigan Association of Computer Users in Learning March 11, 1999
  - o *Connecting to Your Community*
- Michigan Council on Social Studies Conference March 8, 1999
  - o Co-presented with Paula Smith, *Interactive World Wide Web: Resources for Studying Communities*
- Michigan Education Association Conference Dec. 4, 1998
  - o Co-presented with Shirley Freed, *Connecting to Your Community*
- Michigan Association of Computer Users in Learning March 12, 1998
  - o *The Successful One Computer Classroom*
- Michigan Reading Association Conference March 16, 1997
  - o *The World Wide Web and Literacy*

## Publications

### Refereed Journal Publications

Lim, J., & Freed, S. (2009). We have the videoconference equipment installed, now what? *The Qualitative Report*, 14(3), 433-453. Retrieved from <http://www.nova.edu/ssss/QR/QR14-3/lim.pdf>

### Professional Journal Publications

Lim, Janine. (2010). Jazz up your curriculum. *Learning and Leading with Technology*, 38(1), 20-21.

Lim, Janine. (May-June 2008). Knocking down walls. *EdTech Magazine: K12 Focus*.

Lim, Janine. (Spring 2008). Using the ASK process to interview authors and specialists. *Media Spectrum*, (35)1, 24-26.

Lim, Janine and Porter, Sue. (December 2001). TWICE supports distance learning in Michigan. *etin (Newsletter for the National Association of Media and Technology Centers)*. 2-4.

Lim, Janine. (September/October 2001). Effective Internet research. *The Clearing House*, 75(1), 35-36.

Lim, Janine. (Fall 2000-present). Out on a Lim with EdTech. Regular columnist. *MACUL Journal*. See my article archive online at <http://www.janinelim.com/publications/>

Lim, Janine. (1998-2004). OUT ON A LIM with Educational Technology. Regular columnist. *The Journal of Adventist Education*. See my article archive online at <http://www.janinelim.com/publications/>

Freed, Janine. (1996). Exemplary software for teaching writing. *The Journal of Adventist Education*, 58(5), 27-28.

Freed, Janine (1996). Special education metaphor number two: Two gardens. *The Journal of Adventist Education*, 58(2), 44-45.

### **Online Writing**

Out on a Lim: Reflections on Learning at a Distance. Blog. 2011-present.

Videoconferencing Out on a Lim Blog. 2005-2011. Top-read blog on videoconferencing. <http://vcoutonalim.org/>

### *Special Projects*

*Research Tutorials: Endnote, Library Databases, Getting Organized*. Online video tutorials. Summer 2008. <http://outonalim.wordpress.com/my-tutorials/>

*Collaborations Around the Planet*, a portal for videoconference collaborations with 8500+ users and 35 countries, started in 2007. Social network site designer and lead project management. <http://projects.twice.cc/>

*United States Department of Agriculture Rural Utilities Service Distance Learning and Telemedicine Grant 2005*. \$350,000 benefiting 13 districts in Berrien & Cass County. 2006-2009

*State of Michigan Educational Technology Plan Committee*. Summer 2005

*Michigan Grade Level Content Expectation Videoconference Project*. Videoconferences to match Berrien County Collaborative Curriculum and Michigan Curriculum Frameworks. Fall 2004

*Keystone Conference Steering Committee*. January - October 2004

*3000 7th Graders Handheld Technology Grant*. Winter 2003

*Read Around the Planet*, an annual international videoconference event with almost 2000 classrooms participating. (2002-present). <http://www.twice.cc/read/>

*TIME: Technology Integration Modeling Experience*. 2000-2003

*Videoconferencing Content Providers Database*, used internationally and sponsored by Polycom since 2005. <http://www.vccontentproviders.org/>

## Honors and Awards

2011 International Society for Technology in Education Special Interest Group Online Learning Award Third Place for *Read Around the Planet*

2010 Michigan Association of Computer Users in Learning Educator of the Year

2009 Computerworld Honors Program Laureate

2008 United States Distance Learning Association Outstanding Leadership Award

2005 Adventist Virtual Learning Network Individual Collaborative Spirit Award

2004 Center of Science and Industry Excellence in Education Through Technology Award

2003 Two Way Interactive Connections in Education President's Award for Outstanding Achievement in Distance Learning

2000 Exemplary Online Course chosen as part of a study sponsored by WebCT.

## Online Portfolio

Available at <http://www.janinelim.com/leadportfolio/>

# LYNLEY R. BARTLETT

2439 Saint Albert Terrace, Brookeville, MD 20833 • C# (301) 525-9715 • H# (301) 774-2883 • e-mail: [lynleybartlett@gmail.com](mailto:lynleybartlett@gmail.com)

---

## OBJECTIVE

---

Well-qualified to make a contribution as:

- Professor in traditional & nontraditional learning environments
- Instructor to adult learners, particularly retirees and lifelong learners
- Senior administrator for education and nonprofit organizations
- Leader/promoter/trainer of people, projects, and programs

## EXPERIENCE

---

### **BARFIELDS EDUCATION CONSULTING**

*Senior Consultant, September 2009 — Present*

Offerings:

- Designs and leads workshops/seminars in leadership, organizational behavior, budgeting, hiring/training faculty & staff, marketing, enrollment management, philanthropy, quality management, government & external relations, & philosophy of church-related schools
- Conducts institutional review & audits ... either partial or complete
- Event & motivational speaker ... writer of articles, & manuscripts ... open to travel

### **DEVRY UNIVERSITY D.C. METRO CAMPUS**

*Dean of Graduate Studies and Advisement, March 2009 — June 30, 2009*

Responsibilities:

- Taught online courses to adult learners
- Administered graduate programs at Crystal City, Bethesda, & Manassas locations
- Supervised faculty ... including hiring & professional development
- Increased student enrollment & persistence & improve retention & graduation rates
- Reorganized Admissions department

Accomplishments:

- Increased graduate enrollment by 7% for May session ... first increase in two years
- Hired new graduate faculty and visited all faculty classrooms
- Designed new student orientation program & refocused persistence plan
- Consolidated Admissions team & held weekly meetings

### **DEVRY UNIVERSITY BETHESDA CENTER**

*Center Dean, July 2001 — March 2009*

Responsibilities:

- Taught in class and online graduate courses
- Administered graduate and undergraduate academic programs
- Hired, trained & supervised faculty, admissions, & enrollment management
- Increased student enrollment

Accomplishments:

- Transitioned from classroom teaching to online to blended deliveries of learning
- Enrolled 400 graduate students in February, 2004
- Facilitated professional and academic success of some 550 students
- Achieved a competent, professional, and stable adjunct faculty
- Member of the Greater Bethesda-Chevy Chase Chamber of Commerce
- DeVry University PRIDE recipient for Academic Leadership, December, 2005
- Project Management Institute, Certificate of Appreciation, October, 2007

**INFOCAST CORPORATION***Vice President of Distance Learning, Fall 1998 — July 2001*

Responsibilities:

- Promoted and education of distance learning for InfoCast Corporation (Canada & U.S.) as the premier enabler of distributive learning over any electronic medium. Corporate partners include AT&T Canada and Sun Microsystems

Accomplishments:

- Partnered with U.S. Army (AIPD) and produced *Soldier Online* program
- Gained knowledge and competencies in online learning platforms, software, curriculum design & course delivery in online settings within military, corporate & international educational settings

**COLUMBIA UNION COLLEGE***Vice President for Academic Administration, 1994 — mid-1998*

Responsibilities:

- Second highest ranking administrator of the college
- Appointed member of Board of Trustees
- Hired as full professor
- Assigned part-time undergraduate teaching in traditional & nontraditional programs
- Assigned academic leadership of the traditional and non-traditional undergraduate programs
- Supervised all faculty departments, directors of admissions, records, enrollment services & financial aid
- Sponsored chorale and concert band

Accomplishments:

- Achieved high ratings as professor of history
- Revitalized Adult Evening Program (AEP) office staff and assigned teaching team
- Nontraditional enrollment increased by 135% in three years
- Profit from AEP increased ten-fold as in Operating Report, June 30, 1998
- Founded Faculty Seminars program
- Public speaker & euphonium player in college band

**AVONDALE COLLEGE (NEW SOUTH WALES, AUSTRALIA)***Vice President for Public Relations and College Development, mid-1989 — 1993*

Responsibilities:

- Senior administrator of college; member of cabinet & board of trustees
- Internal and external relations, alumni relations, development, and enrollment services
- Promoted and recruited throughout Australia, New Zealand, South-east Asia, and Orient

Accomplishments:

- Established an alumni association (11,000 living alumni) & chair of Homecoming, 1991-93
- Founded an annual giving program ... raised \$93,000 in first campaign
- Worked extensively with local community, retirees, and church members
- Connected with local government & chamber of commerce. Received award from Chamber of Commerce in 1993. Continuous public speaking engagements around Australia
- Public speaker, master of ceremonies, & euphonium player in community brass band



**COLUMBIA UNION COLLEGE***Associate Dean and Director of the Adult Evening Program, mid-1986 — mid-1989*

Responsibilities:

- Undergraduate teaching in nontraditional program
- Leadership & management of the non-traditional adult education program including curriculum design, adjunct faculty hire and supervision, and control of advertising and marketing budgets

Accomplishments:

- Secured marketing experience and knowledge
- Earned award from Washington Post for marketing results
- Student enrollment increased by 49%
- Board of Trustees recognition

**LILYDALE ADVENTIST ACADEMY (VICTORIA, AUSTRALIA)***Principal and Business Manager, 1980 — 1985*

Responsibilities:

- Part-time English, history, and religion teacher. Taught Grade 12 *European History, 1300 – 1600*
- Assigned leadership & management of the academic, financial, and boarding programs of a co-educational day/boarding high school of 350 students and 45 faculty and staff

Accomplishments:

- Rebuilt boarding house program and, in the process, changed the entire dynamic of the day/boarding high school of some 350 students ... enrollment increased from 212 in 1979 to 350 in 1985 (an unprecedented 60% increase)
- Managed 45-member concert band & a 35-voice chorale. Drum major. Euphonium player
- Founded Victorian Adventist Education Foundation
- Public speaker
- Board of management recognition and sponsored PhD program in the United States

**EDUCATION**

---

UNIVERSITY OF MARYLAND, (College Park, Maryland)  
*Doctor of Philosophy (Adult and Higher Education)*

ANDREWS UNIVERSITY, (Berrien Springs, Michigan)  
*Master of Arts (Educational Administration)*

PACIFIC UNION COLLEGE, (Angwin, California)  
*Bachelor of Arts (History major/English minor)*

**PROFESSIONAL ASSOCIATIONS**

---

Member, Council for Advancement and Support of Education.

Member, Society for Human Resources Management

Member, Phi Alpha Theta

---

**PROFESSIONAL QUALIFICATIONS & CAREER INTERESTS**

---

- Administration of higher education; with a focus on life-long learning programs.
- Adult development and adult education; especially over 50s and retirees.
- Philanthropy in theory and practice and fundraising for non-profit organizations.
- Continuous quality management, organizational structure, and strategic planning.
- Marketing and enrollment services.
- Online Learning; administration, design, delivery and assessment
- Teaching and professional presentations

---

**REFERENCES**

---

Available on request

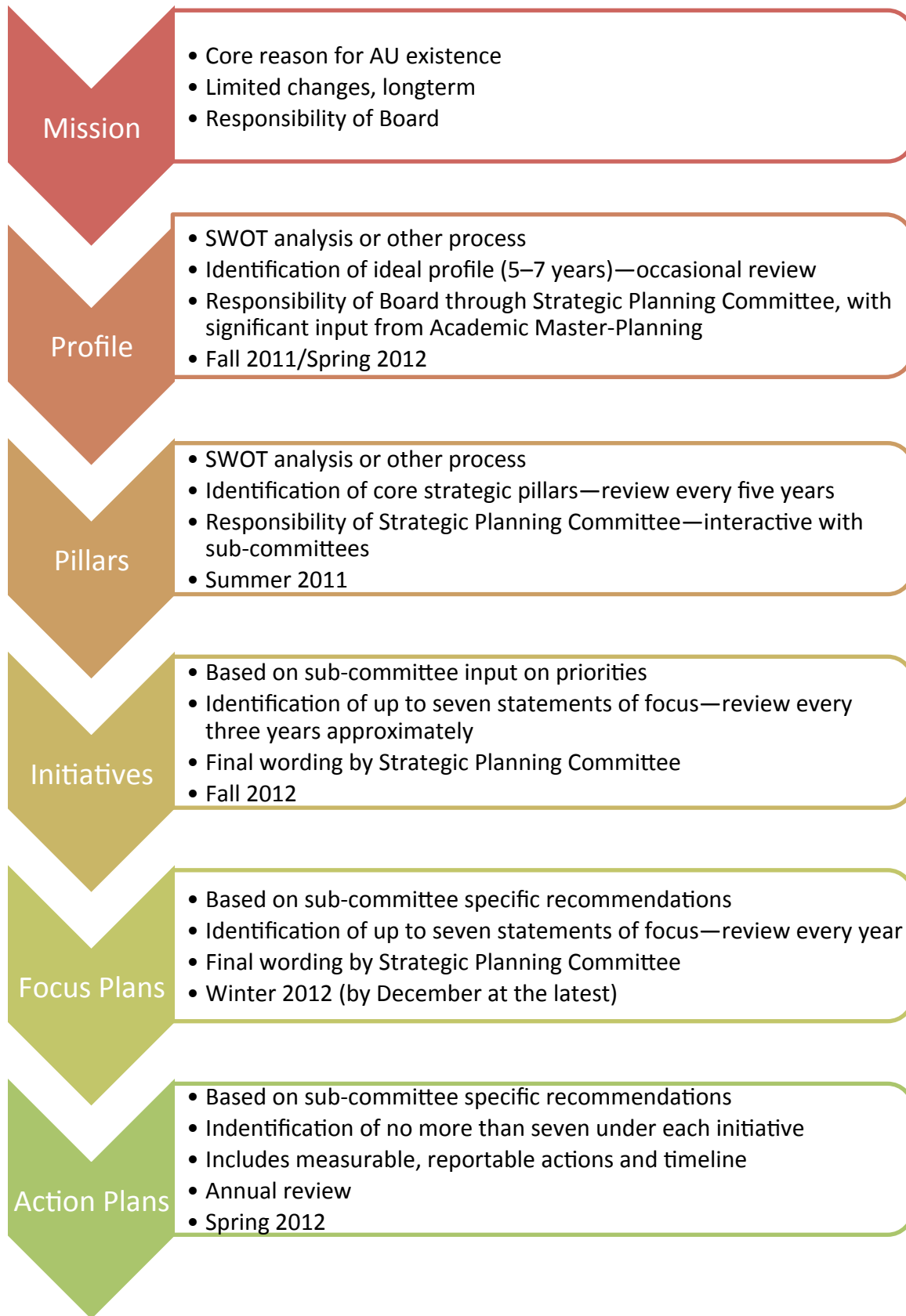


# Strategic Planning Process

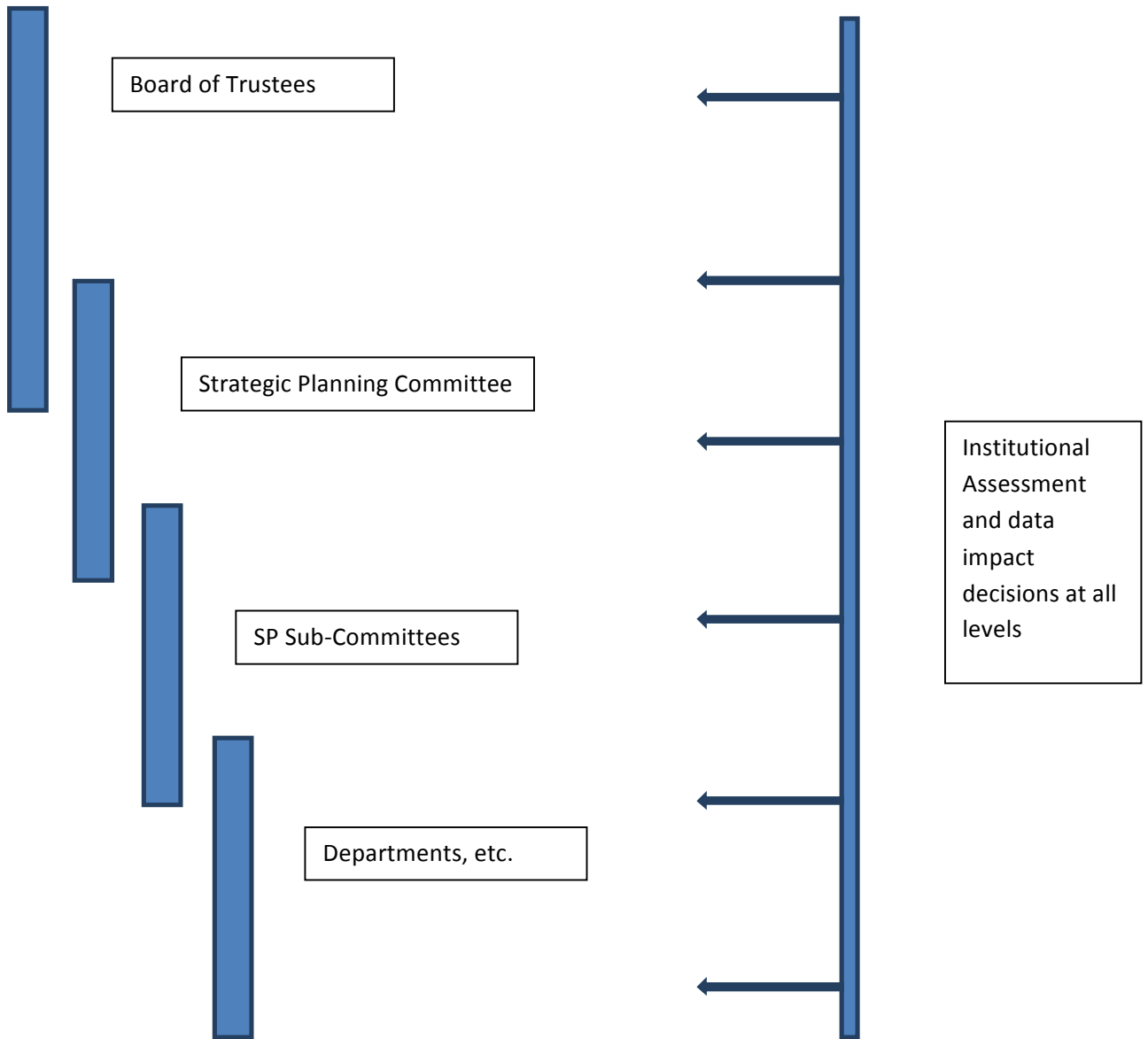


1. Mission, Vision, Institutional Goals (Values)  
SWOT analysis
2. Institutional Profile
3. Strategic Pillars
4. Strategic Initiatives
5. Focus and Action Plans

# Strategic Planning Process

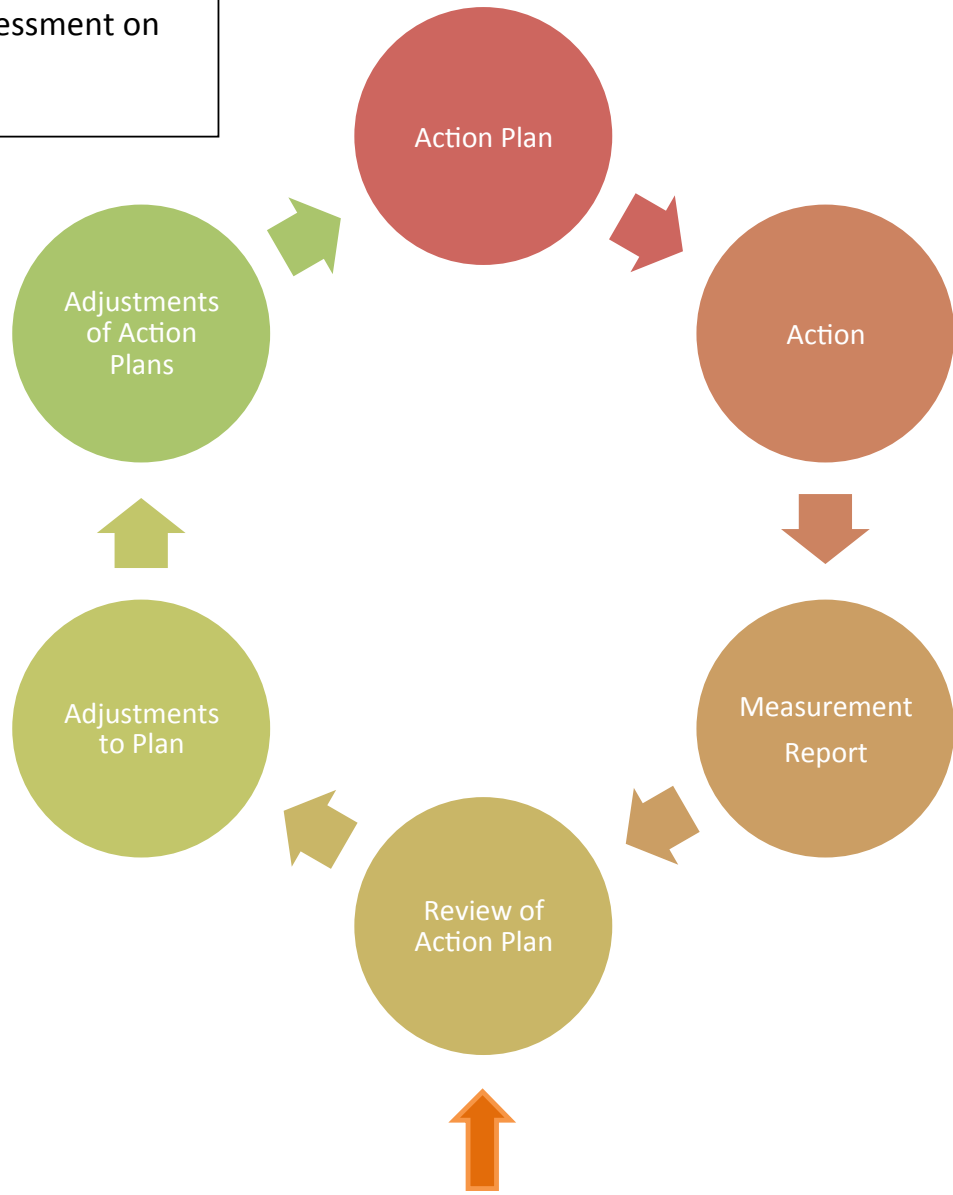


# Strategic Planning Process



# Strategic Planning Process

The Planning Cycle must be continuous and interact with institutional assessment on an annual basis.



Inputs from campus assessment reports, institutional profile annual data, committees/boards and external environmental







## **Andrews University Proposed Assessment Policies Final Draft**

### **Assessment Validation Process**

The University's assessment processes are linked to the mission and goals of the University. Assessment plans of programs across the University are periodically evaluated for relevance to the University mission, as well as for reliability, validity and usability, by the Committee for Institutional Assessment. Assessment plans of academic programs are also evaluated through the routine academic program review process facilitated by the Program Development and Review Committee. Proposals for new programs are submitted to the same committee, and are required to include an assessment plan. These committees include faculty from across the University at both the undergraduate and graduate levels. In addition, the Committee for Institutional Assessment includes representatives from Administration, Student Life, and other support services. Recommendations are sent to program faculty and/or staff for their review, input and where appropriate, implementation.

### **Annual Assessment Cycle and Data Collection**

Assessments of personnel, students, courses, programs and the University follow a regular cycle. Staff, faculty and administrators undergo a review each January, with staff evaluated by their supervisors, faculty by their department chairs, department chairs by the deans, deans by the provost and faculty in their schools, and administrators by their peers. Areas for improvement and personal goals are noted in faculty files, and are reviewed the following year. Faculty and courses are assessed by students at the end of each semester through course evaluations. Throughout the year, faculty evaluate assessment data in courses for student achievement of course and program outcomes. Course outcomes are in harmony with program outcomes, and program outcomes are linked to University goals. Support programs and offices assess indicators of how well they are supporting the operations of the University, in order to facilitate student learning. Data for each program are aggregated and compiled by the departments at the end of each school year. Assessment summaries are reported in the University's assessment management system by the end of summer or shortly thereafter, and are shared with and reviewed by program faculty and/or staff. Any changes for program improvement are drafted and voted on by the appropriate group in early fall. Academic changes are included in the new *Andrews University Bulletin*.

### **Feedback Loop Process**

The feedback loop consists of formative feedback, plans for improvement, summative feedback, evaluation decisions, and revisions and renewal. The sequence of these elements leads toward improved student outcomes and may be recursive. For example, summative feedback leads to making evaluation decisions, which may lead back to further plans for improvement. The decisions may also lead to student advancement through a program, faculty/staff members' advancement on the salary scale or in rank, administrators' advancement on the salary scale, or revisions of University programs or operations. In any case, these evaluation decisions are treated as steps on the path to re-visioning and renewing University persons and programs. After action plans are developed for re-visioning or renewing, these plans are shared with key stakeholders in the programs. These stakeholders may provide corrective feedback that leads to re-thinking these plans. Eventually the feedback from the University's partners helps ensure that the University maintains quality programs for the preparation of qualified graduates.

### **Follow-up Studies**

The University gathers follow-up information on all graduates and programs through such means as exit interviews or surveys, alumni surveys and employer surveys. Exit interviews or surveys are conducted by some programs or departments prior to students' graduation. The University conducts surveys of alumni five years after they graduate from their programs. Some programs also conduct their own alumni and employer surveys at intervals determined by the program faculty or their own

external accreditation requirements. Follow-up studies gather information on job placement and the attainment of University goals, as well as information related to program quality.

### **Assessment of Unit Operations**

Three different entities are responsible for managing the assessment of unit operations: the provost, the school deans, and the director of Human Resources. The provost is responsible for managing the processes related to evaluation of the deans and directors of academic support units or programs. The official records for the relevant administrator Performance Reviews are kept in the Office of the Provost. The school deans are responsible for managing the processes related to budget accountability and chair evaluations. Department chairs are responsible for managing the processes related to faculty evaluations. Official budget records and the Faculty Annual Report documentation for chairs and faculty are kept in the offices of the school deans. The director of Human Resources is responsible for managing the processes related to support staff evaluations. Official records of support staff evaluations are kept in the Office of Human Resources.

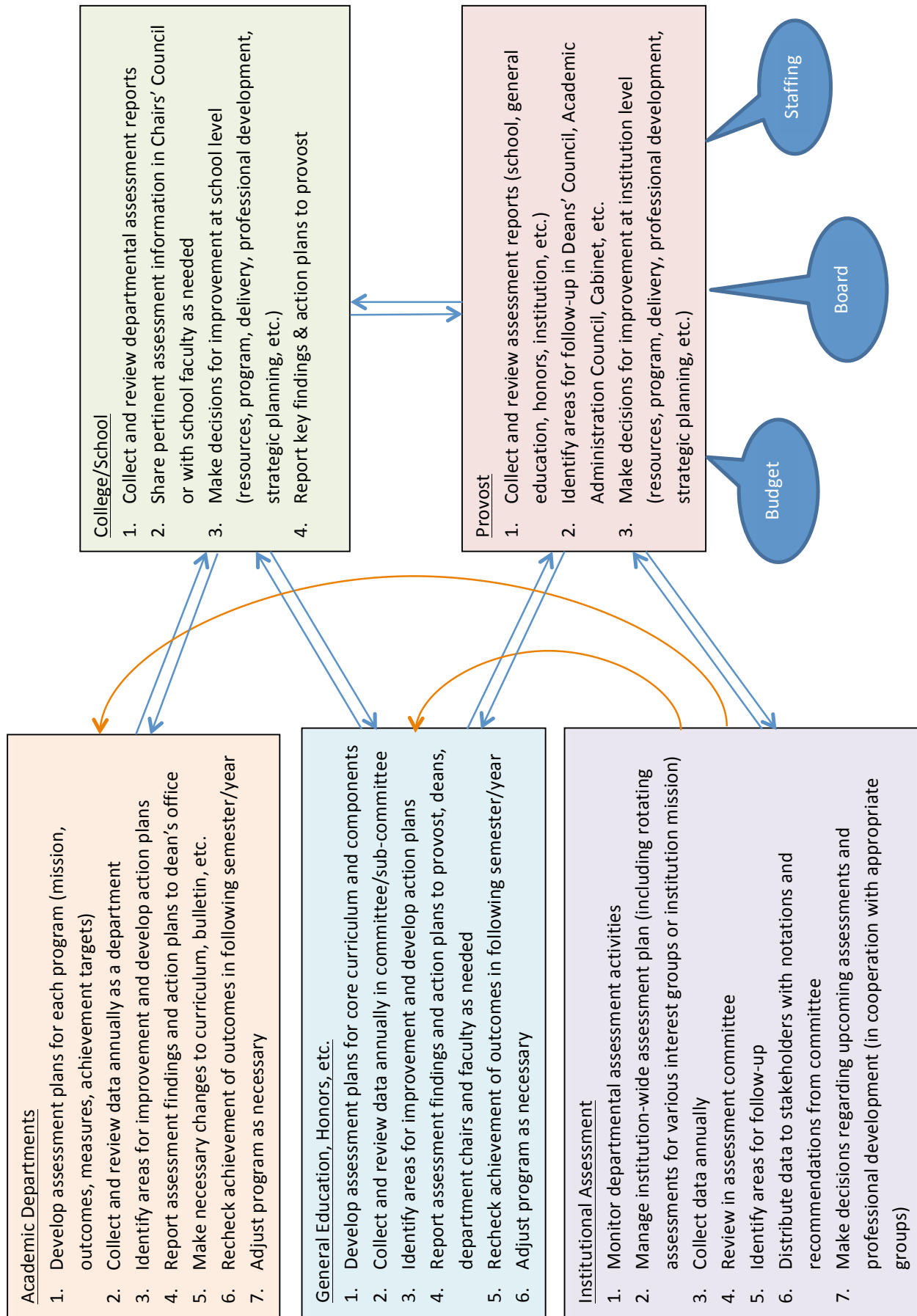
The deans are also responsible for monitoring the assessment of unit operations that relate to overall program quality in their schools. The assessment director, in cooperation with the deans, assists department chairs and program coordinators in developing and refining program assessment plans, and reviewing results. The assessment director monitors assessment activity and makes regular reports to the deans regarding the progress of each of the programs in their schools. Department chairs and program coordinators submit annual assessment reports to their deans each fall, including any recommendations program faculty have made for areas for improvement. The deans take these recommendations into consideration as they prepare the budget for the upcoming year. The school deans submit major recommendations for their schools to the provost. Together in Deans' Council, the provost and deans make decisions for improvements to be made at the University level. (See Academic Assessment Process Map)

Similarly, directors of academic support units and programs are responsible for the assessment of their areas, with the support of the assessment director. The assessment director reports the progress of these units to the provost. Directors submit their assessment reports to the provost annually each fall, along with recommendations from their faculty or staff for program improvement. Major improvements and budget decisions are made in consultation with the provost.





**APPENDIX D**  
 Andrews University  
 Academic Assessment Process Map





---

---

# FINANCIAL REPORT

**June 30, 2011 and 2010**

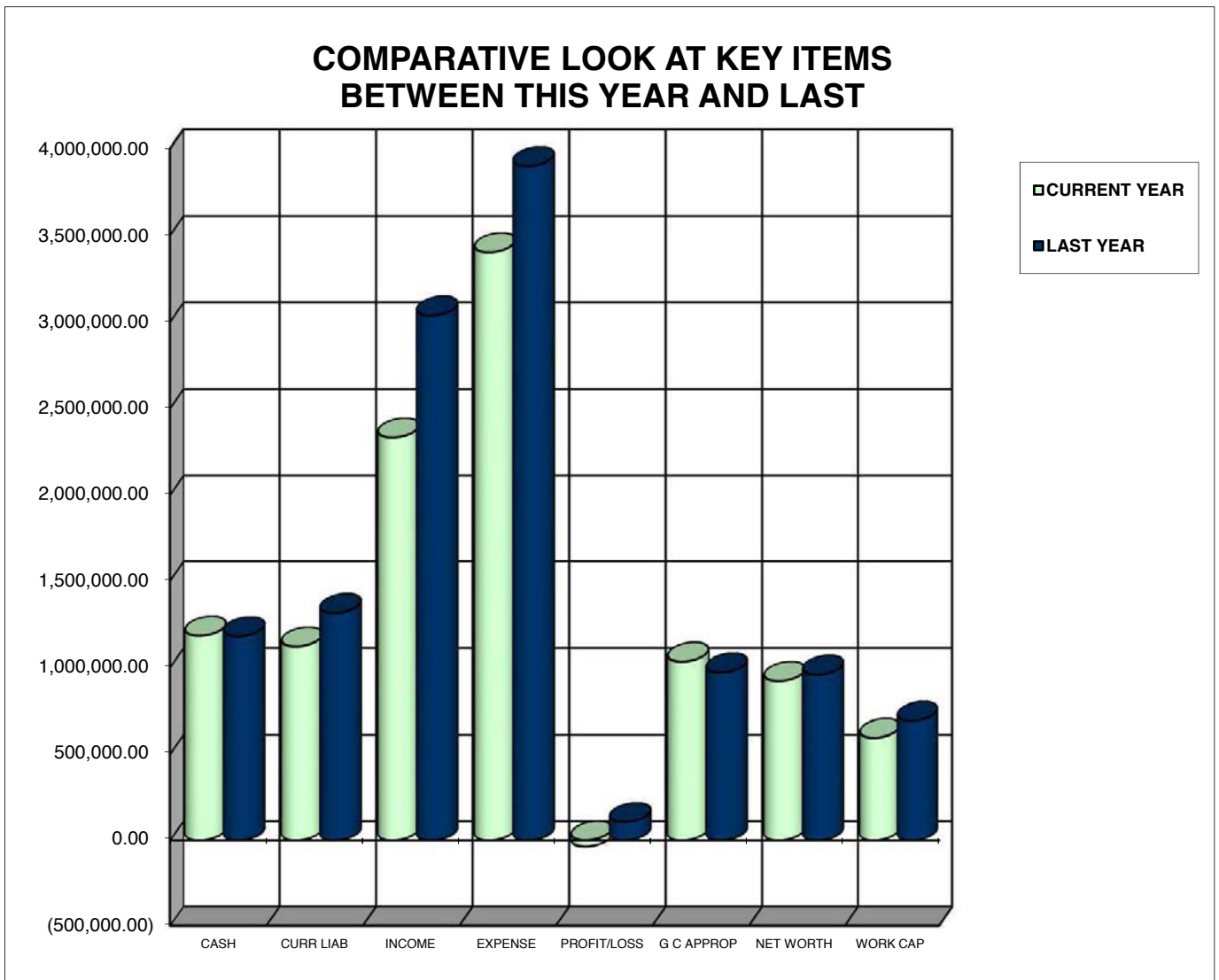


12501 OLD COLUMBIA PIKE  
SILVER SPRING, MD 20904



**GRIGGS UNIVERSITY**  
**COMPARATIVE VIEW OF KEY ITEMS**  
 JUNE 30, 2011 AND 2010

	CODE ON GRAPH	2011	2010
CASH AND BANK BALANCES	CASH	1,181,913.60	1,178,487.69
CURRENT LIABILITIES	CURR LIAB	1,119,947.94	1,313,183.47
OPERATING INCOME	INCOME	2,331,303.48	3,034,929.53
OPERATING EXPENSES	EXPENSE	3,400,688.98	3,897,924.92
NET PROFIT OR (LOSS)	PROFIT/LOSS	(36,907.04)	106,524.65
APPROPRIATION FROM GEN CONF	G C APPROP	1,032,478.46	969,520.04
NET WORTH	NET WORTH	920,787.41	957,694.45
WORKING CAPITAL IN \$\$	WORK CAP	592,914.22	691,090.00
WORKING CAPITAL AS A PERCENTAGE OF REQUIREMENT		87.18%	88.65%
PERCENTAGE OF LIQUIDITY		105.53%	89.74%



**GRIGGS UNIVERSITY**  
**STATEMENT OF FINANCIAL POSITION**  
 JUNE 30, 2011 AND 2010

	2011	2010
<b>ASSETS</b>		
<u>CURRENT ASSETS</u>		
CASH AND CHECKING ACCOUNTS	329,564.25	379,756.39
GENERAL CONFERENCE INVESTMENT FUND	852,349.35	798,731.30
ACCOUNTS RECEIVABLE (NOTE 3)	223,872.36	418,879.00
INVENTORIES	276,086.05	377,701.56
PREPAID EXPENSES	30,990.15	29,205.22
<b>TOTAL CURRENT ASSETS</b>	<b>1,712,862.16</b>	<b>2,004,273.47</b>
<u>PROPERTY, PLANT AND EQUIPMENT (NOTE 4)</u>		
OFFICE EQUIPMENT	23,749.26	35,079.42
COMPUTER EQUIPMENT	24,924.40	43,109.27
PRINTSHOP EQUIPMENT	0.00	613.33
<b>TOTAL PROPERTY, PLANT AND EQUIPMENT</b>	<b>48,673.66</b>	<b>78,802.02</b>
<u>OTHER ASSETS</u>		
GC INVESTMENT OF HSI FUNDS	728,300.00	728,300.00
<b>TOTAL ASSETS</b>	<b>2,489,835.82</b>	<b>2,811,375.49</b>
<b>LIABILITIES</b>		
<u>CURRENT LIABILITIES</u>		
ACCOUNTS PAYABLE (NOTE 5)	476,573.44	433,175.06
NOTES PAYABLE--CURRENT PORTION (NOTE 6)	0.00	0.00
DEFERRED INCOME	643,374.50	880,008.41
<b>TOTAL CURRENT LIABILITIES</b>	<b>1,119,947.94</b>	<b>1,313,183.47</b>
<u>LONG TERM LIABILITIES</u>		
NOTES PAYABLE (NOTE 6)	0.00	0.00
<b>TOTAL LIABILITIES</b>	<b>1,119,947.94</b>	<b>1,313,183.47</b>
<b>FUND BALANCE</b>		
UNRESTRICTED NET ASSETS	920,787.41	957,694.45
TEMPORARILY RESTRICTED NET ASSETS	449,100.47	540,497.57
<b>TOTAL FUND BALANCE</b>	<b>1,369,887.88</b>	<b>1,498,192.02</b>
<b>TOTAL LIABILITIES AND FUND BALANCE</b>	<b>2,489,835.82</b>	<b>2,811,375.49</b>

**GRIGGS UNIVERSITY**  
**STATEMENT OF CHANGES IN FUND BALANCES**  
 FOR 12 MONTHS ENDED JUNE 30, 2011 AND 2010

	<u>2011</u>	<u>2010</u>
<b>UNRESTRICTED FUND BALANCE</b>		
BALANCE JULY 01	957,694.45	851,169.80
NET INCOME/(LOSS) FROM OPERATING	(36,907.04)	106,524.65
NET TRANSFERS IN/(OUT) OF TEMPORARILY RESTRICTED FUNDS		
BALANCE, JUN 30	<u>920,787.41</u>	<u>957,694.45</u>

**TEMPORARILY RESTRICTED FUND BALANCE**

DONOR RESTRICTED FUND:	BAL JUL 01	NET RECEIPTS- DISBURSEMENT	CURRENT BALANCE	LAST YEAR BALANCE
WORTHY STUDENT FUND	131.32	34.64	165.96	131.32
RESERVE FOR AFRICAN STUDENTS	2,332.50	(2,332.50)	0.00	2,332.50
RESERVE FOR TANZANIA	7,228.02	(6,650.00)	578.02	7,228.02
RESERVE:GC SPECIAL PROJECT FUNDS	450,626.43	(102,449.24)	348,177.19	450,626.43
RESERVE:NEW ELEM CURRICULUM (see detail below)	77,354.30	20,000.00	97,354.30	77,354.30
RESERVE:VARIOUS PROJECTS	400.00	0.00	400.00	400.00
RESERVE FOR TECHNOLOGY PROJECT	0.00	0.00	0.00	0.00
RESERVE FOR CHINA PROJECT	2,425.00	0.00	2,425.00	2,425.00
TOTAL TEMPORARILY RESTRICTED FUNDS	<u>540,497.57</u>	<u>(91,397.10)</u>	<u>449,100.47</u>	<u>540,497.57</u>

**ELEMENTARY COURSE DEVELOPMENT PROJECT**

RECEIVED		
BALANCE FROM LAST YEAR	77,354.30	142,354.30
RECEIVED THIS YEAR	20,000.00	35,000.00
TOTAL FUNDS AVAILABLE	<u>97,354.30</u>	<u>177,354.30</u>

USED	0.00	100,000.00
BALANCE	<u>97,354.30</u>	<u>77,354.30</u>

**DEFERRED INCOME**

STUDENT TUITION	637,974.50	704,051.45
AFFILIATION FEES	5,400.00	164,400.00
GC SPECIAL APPROPRIATION	0.00	11,556.96

TOTAL	<u>643,374.50</u>	<u>880,008.41</u>
-------	-------------------	-------------------

## STATEMENT OF FINANCIAL ACTIVITY

FOR 12 MONTHS ENDED JUNE 30, 2011 AND 2010

	2011		2010	
<b>INCOME</b>				
<u>REGULAR OPERATING INCOME</u>				
NET TUITION INCOME	1,241,380.81	53.2484%	1,233,453.36	40.6419%
SALE OF STUDENT SUP (NOTE 7)	19,324.85	0.8289%	60,718.87	2.0007%
TOTAL ENROLLMENT INCOME	1,260,705.66	54.0773%	1,294,172.23	42.6426%
INVESTMENT INCOME--BANK DEPOSITS	1,618.05	0.0694%	1,554.95	0.0512%
INVESTMENT INCOME--GC PLANT FUND	17,956.93	0.7703%	17,919.16	0.5904%
GC SUBSIDIES IN KIND--RENT & PHONE	0.00	0.0000%	0.00	0.0000%
MISCELLANEOUS INCOME	3,649.64	0.1565%	7,379.32	0.2431%
OTHER INCOME/(EXPENSE) (NOTE 13)	1,047,373.20	44.9265%	1,713,903.87	56.4726%
TOTAL REGULAR OPERATING INCOME	2,331,303.48	100.0000%	3,034,929.53	100.0000%
<b>EXPENSE</b>				
<u>REGULAR OPERATING EXPENSE</u>				
SALARIES AND ALLOW (NOTE 8)	1,533,875.86	65.7948%	1,718,570.31	56.6264%
EMPLOYEE RELATED EXPENSE	357,078.81	15.3167%	378,103.51	12.4584%
TEACHERS, GRADING + EXPENSE	180,800.50	7.7553%	168,072.87	5.5379%
COURSE DEVELOPMENT	55,459.29	2.3789%	63,849.18	2.1038%
SHIPPING AND POSTAGE	52,692.79	2.2602%	49,500.75	1.6310%
DEPRECIATION	32,445.27	1.3917%	48,306.20	1.5917%
OFFICE RENT AND EQUIP MAINTENANCE	459,737.93	19.7202%	462,403.16	15.2360%
TELEPHONE	13,208.10	0.5666%	25,280.25	0.8330%
DATA PROCESSING	12,891.65	0.5530%	26,618.88	0.8771%
AUDITING COST	14,988.00	0.6429%	14,852.00	0.4894%
OFFICE SUPPLIES	79,427.46	3.4070%	61,227.63	2.0174%
MARKETING	181,385.76	7.7804%	242,715.59	7.9974%
GENERAL	311,811.56	13.3750%	427,524.65	14.0868%
PRINTSHOP EXPENSE	215,304.66	9.2354%	350,827.78	11.5597%
LESS: TO ELIMINATE DUPLICATIONS	(100,418.66)	-4.3074%	(139,927.84)	-4.6106%
TOTAL REGULAR OPERATING EXPENSE	3,400,688.98	145.8707%	3,897,924.92	128.4354%
INCREASE (DECREASE) BEFORE APPROP	(1,069,385.50)	-45.8707%	(862,995.39)	-28.4354%
GC APPROPRIATIONS: TITHE & NON TITHE	310,302.00	13.3102%	265,276.00	8.7408%
: SPECIAL	280,395.46	12.0274%	260,004.04	8.5671%
: RENT	441,781.00	18.9500%	444,240.00	14.6376%
Total Appropriations	1,032,478.46		969,520.04	
INCREASE (DECREASE) FROM OPERATIONS	(36,907.04)	-1.5831%	106,524.65	3.5100%
<b>TRANSITION RELATED EXPENSE</b>				
EXPENSE	102,449.24		0.00	
FUNDS FROM GC SPECIAL RESERVE	(102,449.24)		0.00	

## STATEMENT OF CASH FLOW

FOR 12 MONTHS ENDED JUNE 30, 2011 AND 2010

	2011	2010
FINANCIAL RESOURCES WERE PROVIDED (USED) BY:		
<b><u>OPERATING ACTIVITY:</u></b>		
NET GAIN (LOSS)	(36,907.04)	106,524.65
ADJUSTMENTS NOT AFFECTING CASH:		
DEPRECIATION EXPENSE	32,445.27	48,306.20
LOSS (GAIN) ON DISPOSAL OF FIXED ASSETS		
(INCREASE) DECREASE IN RECEIVABLES	195,006.64	(9,832.83)
(INCREASE) DECREASE IN INVENTORIES	101,615.51	83,359.61
(INCREASE) DECREASE IN PREPAID EXPENSE	(1,784.93)	80,774.66
INCREASE (DECREASE) IN ACCOUNTS PAYABLE	43,398.38	(7,070.36)
INCREASE (DECREASE) IN DEFERRED INCOME	(236,633.91)	105,641.14
CASH PROVIDED (USED) BY OPERATING ACTIVITY	<u>97,139.92</u>	<u>407,703.07</u>
<b><u>CAPITAL ACTIVITY</u></b>		
PURCHASE OF PLANT ASSETS	2,316.91	(48,296.30)
DISPOSAL OF FIXED ASSETS		
DONOR RESTRICTED FUNDS INCREASE (DECREASE)	(91,397.10)	(169,928.03)
<b><u>FINANCING ACTIVITY</u></b>		
INCREASE (DECREASE) IN NOTES PAYABLE	0.00	0.00
NET FINANCIAL RESOURCES PROVIDED (USED)	3,425.91	189,478.74
RESOURCES AVAILABLE - BEGINNING OF PERIOD	1,178,487.69	989,008.95
FINANCIAL RESOURCES AVAILABLE JUN 30	<u><u>1,181,913.60</u></u>	<u><u>1,178,487.69</u></u>
<b><u>FINANCIAL RESOURCES:</u></b>		
CASH	329,564.25	379,756.39
INVESTMENT	852,349.35	798,731.30
	<u><u>1,181,913.60</u></u>	<u><u>1,178,487.69</u></u>

**NOTE 01 - NATURE OF ORGANIZATION**

HOME STUDY INTERNATIONAL (HSI) IS A NOT FOR PROFIT CORPORATION AFFILIATED WITH THE GENERAL CONFERENCE OF THE SEVENTH DAY ADVENTIST CHURCH, PROVIDING GUIDED INDEPENDENT STUDY AND DISTANCE EDUCATION PROGRAMS IN THE WHOLE WORLD. IT ALSO OPERATES A PRINTING PRESS TO PRODUCE MATERIAL FOR ITS OWN EDUCATION PROGRAM, AS WELL AS PRODUCING MATERIAL FOR ITS AFFILIATES. ITS PRINCIPAL OFFICES ARE LOCATED IN SILVER SPRING, MARYLAND, USA.

**NOTE 02 - SUMMARY OF SIGNIFICANT ACCOUNT POLICIES**

HSI PREPARES ITS FINANCIAL STATEMENTS IN ACCORDANCE WITH GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, WHICH INVOLVES THE APPLICATION OF ACCRUAL ACCOUNTING; CONSEQUENTLY, REVENUES AND GAINS ARE RECOGNIZED WHEN EARNED, AND EXPENSES AND LOSSES ARE RECOGNIZED WHEN INCURRED.

INVENTORIES: INVENTORIES CONSIST PRIMARILY OF TEXTBOOKS, WORKBOOKS AND PAPER SUPPLIES AND ARE CARRIED AT THE LOWER OF COST OR MARKET DETERMINED BY THE FIRST-IN, FIRST-OUT METHOD.

CONTRIBUTIONS: CONTRIBUTIONS RECEIVED ARE RECORDED AS UNRESTRICTED, TEMPORARILY RESTRICTED, OR PERMANENTLY RESTRICTED SUPPORT, DEPENDING ON THE EXISTENCE AND/OR NATURE OF ANY DONOR RESTRICTIONS.

FIXED ASSETS: FURNITURE AND EQUIPMENT ARE STATED AT COST LESS ACCUMULATED DEPRECIATION. DEPRECIATION IS BEING CALCULATED BY THE STRAIGHT-LINE METHOD OVER THE ESTIMATED USEFUL LIFE OF THE ASSETS AS DETERMINED BY DENOMINATIONAL POLICY.

REVENUE RECOGNITION: REVENUE IS RECOGNIZED AS LESSONS ARE COMPLETED. UNEARNED TUITION IS SHOWN AS DEFERRED TUITION INCOME.

**NOTE 03 - ACCOUNTS RECEIVABLE**

	<u>2011</u>	<u>2010</u>
STUDENT ACCOUNTS	148,991.84	377,840.88
OTHER RECEIVABLES	92,847.53	62,162.96
	<u>241,839.37</u>	<u>440,003.84</u>
LESS: ALLOWANCE FOR BAD DEBTS	17,967.01	21,124.84
NET ACCOUNTS RECEIVABLE:	<u><u>223,872.36</u></u>	<u><u>418,879.00</u></u>

**NOTE 04 - PROPERTY, PLANT AND EQUIPMENT**

	<u>COST</u>	<u>ACCUM DEPREC</u>	<u>BOOK VALUE</u>	<u>EXPENSE</u>
OFFICE EQUIPMENT	184,435.41	160,686.15	23,749.26	11,618.16
COMPUTER EQUIPMENT	1,020,617.58	995,693.18	24,924.40	20,213.78
PRINTSHOP EQUIPMENT	97,490.41	97,490.41	0.00	613.33
TOTAL FIXED ASSETS	<u><u>1,302,543.40</u></u>	<u><u>1,253,869.74</u></u>	<u><u>48,673.66</u></u>	<u><u>32,445.27</u></u>

**NOTE 05 - ACCOUNTS PAYABLE**

	<u>2011</u>	<u>2010</u>
TRADE ACCOUNTS PAYABLE (VENDORS & STUDENTS)	119,812.11	112,681.60
ACCRUED SALARIES, TEACHERS' WAGES, AND TAXES	72,494.45	65,277.94
ACCRUED VACATION PAY	100,248.22	100,248.22
RETIREMENT ALLOWANCE PAYABLE	130,951.98	125,269.02
GENERAL CONFERENCE		
MISCELLANEOUS	53,066.68	29,698.28
TOTAL ACCOUNTS PAYABLE	<u>476,573.44</u>	<u>433,175.06</u>

**NOTE 06 - NOTES PAYABLE**

INTEREST BEARING NOTE FROM XEROX CORPORATION	0.00	0.00
TOTAL NOTES PAYABLE	<u>0.00</u>	<u>0.00</u>

**NOTE 07 - SALE OF STUDENT SUPPLIES**

NET SALES	245,172.15	283,603.68
LESS: COSTS OF SALES	225,847.30	222,884.81
GROSS PROFITS	<u>19,324.85</u>	<u>60,718.87</u>

**NOTE 08 - SALARIES AND ALLOWANCES**

INCLUDED IN OPERATING EXPENSE	1,536,725.86	1,725,377.08
LESS: SALARY AND ALLOWANCES REBATE	2,850.00	6,806.77
SUBTOTAL	<u>1,533,875.86</u>	<u>1,718,570.31</u>
PRODUCTION SALARY (INCLUDED IN OTHER INCOME & EXPENSE)	39,665.41	56,056.95
NET SALARY AND ALLOWANCES	<u>1,573,541.27</u>	<u>1,774,627.26</u>

**NOTE 09 - INCOME TAX STATUS**

HOME STUDY INTERNATIONAL IS A NON-PROFIT, EDUCATIONAL ORGANIZATION OF THE SEVENTH-DAY ADVENTIST CHURCH AND IS EXEMPT FROM FEDERAL, STATE, AND LOCAL INCOME TAXES UNDER PROVISIONS OF SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE.

**NOTE 10 - COMMITMENTS**

HOME STUDY INTERNATIONAL HAS ENTERED INTO AN AGREEMENT WITH THE GENERAL CONFERENCE OF SEVENTH DAY ADVENTISTS TO SURRENDER ITS REAL PROPERTY IN EXCHANGE FOR OFFICE SPACE IN THE NEW CHURCH HEADQUARTERS. THE PROCEEDS FROM THE NEGOTIATED VALUE OF THE PROPERTY HAS BEEN INVESTED BY THE GENERAL CONFERENCE IN A MONEY FUND WITH AN UNDERSTANDING THAT THE EARNINGS FROM THIS INVESTMENT WILL BE APPLIED BY THE GC FOR OCCUPANCY EXPENSES BUT THAT THE WHOLE CAPITAL WILL BE MADE AVAILABLE TO HSI IN CASE HSI HAS TO RELOCATE.

**NOTE 11 - STATEMENT OF WORKING CAPITAL AND LIQUIDITY**

	<u>2011</u>	<u>2010</u>
<b><u>WORKING CAPITAL</u></b>		
CURRENT ASSETS	1,712,862.16	2,004,273.47
LESS: CURRENT LIABILITIES	1,119,947.94	1,313,183.47
NET WORKING CAPITAL	<u>592,914.22</u>	<u>691,090.00</u>
REQUIRED WORKING CAPITAL:		
20% OF ANNUAL OPERATING EXPENSE		
2011 \$ 3,400,688.98	680,137.80	
2010 \$ 3,897,924.92		779,584.98
REQUIRED WORKING CAPITAL	<u>680,137.80</u>	<u>779,584.98</u>
WORKING CAPITAL EXCESS (DEFICIENCY)	(87,223.58)	(88,494.98)
PERCENT OF REQ'D WORKING CAPITAL AVAILABLE	<u>87.18%</u>	<u>88.65%</u>
<b><u>LIQUIDITY STATEMENT</u></b>		
CASH AND CHECKING BANK ACCOUNTS	329,564.25	379,756.39
SAVINGS ACCOUNTS, CD'S, ETC	852,349.35	798,731.30
TOTAL LIQUID ASSETS	<u>1,181,913.60</u>	<u>1,178,487.69</u>
COMMITMENTS:		
CURRENT LIABILITIES	1,119,947.94	1,313,183.47
TOTAL COMMITMENTS	<u>1,119,947.94</u>	<u>1,313,183.47</u>
NET LIQUID ASSETS (DEFICIENCY)	<u>61,965.66</u>	<u>(134,695.78)</u>
PERCENT OF LIQUID ASSETS TO COMMITMENTS	<u>105.53%</u>	<u>89.74%</u>



**NOTE 12 - RETIREMENT PLAN**

STARTING JANUARY 2000, HOME STUDY INTERNATIONAL PARTICIPATES IN A MULTI-EMPLOYER, CONTRIBUTORY DEFINED CONTRIBUTION PENSION PLAN, KNOWN AS THE SEVENTH-DAY ADVENTIST RETIREMENT PLAN OF NORTH AMERICA. THIS PLAN, WHICH COVERS SUBSTANTIALLY ALL EMPLOYEES, IS ADMINISTERED BY THE GENERAL CONFERENCE OF SEVENTH-DAY ADVENTISTS IN WASHINGTON, D. C. AND IS EXEMPT FROM THE EMPLOYEE RETIREMENT INCOME SECURITY ACT OF 1974 (ERISA) AS A PLAN OF A CHURCH RELATED AGENCY.

**NOTE 13 - OTHER INCOME AND EXPENSE**

	<u>2011</u>	<u>2010</u>
CONTRIBUTIONS:UNRESTRICTED	3,480.00	3,330.76
CONTRIBUTIONS: RELEASED FROM TEMPORARY RESTRICTIONS	13,450.00	211,028.88
CONTRACTUAL WORK	0.00	0.00
MISCELLANEOUS OTHER GRANTS	3,000.00	2,750.00
ACADEMIC SERVICES FEE	919,642.80	1,213,685.00
NET OTHER NON CREDIT SALES	0.00	0.00
PRINTSHOP INCOME (SEE NOTE 14)	107,800.40	283,109.23
GAIN/(LOSS) ON EQUIP & INVENTORY	0.00	0.00
NET TOTAL OTHER INCOME AND EXPENSE	<u>1,047,373.20</u>	<u>1,713,903.87</u>

**NOTE 14 - PRINTING DEPARTMENT OPERATIONS**

PRINTING INCOME	<u>107,800.40</u>	<u>283,109.23</u>
EXPENSE:		
SALARY AND ALLOWANCES	38,869.54	55,418.61
MEDICAL ALLOWANCE	795.87	638.34
SOCIAL SECURITY EXPENSE	2,957.14	3,776.18
RETIREMENT FUND	4,645.27	6,787.89
WAGE RELATED EXPENSE	90.29	151.01
MEDICAL INSURANCE	1,240.04	1,861.41
SURVIOR INSURANCE	118.65	208.50
OFFICE SUPPLIES	0.00	0.00
EQUIP MAINT REPAIR	0.00	23.00
SUPPLIES & OTHER EXP	76,016.46	155,458.33
TELEPHONE	400.00	3,600.00
INTEREST ON LOAN	0.00	0.00
EQUIPMENT DEPRECIATION	613.33	920.00
MISCELLANEOUS EXPENSE	0.00	0.00
RENT	73,558.07	73,984.51
ADMINISTRATIVE OVERHEAD	16,000.00	48,000.00
TOTAL EXPENSE	<u>215,304.66</u>	<u>350,827.78</u>
NET GAIN/(LOSS)	<u>(107,504.26)</u>	<u>(67,718.55)</u>

**GRIGGS UNIVERSITY**  
**NOTES TO FINANCIAL STATEMENTS**  
 JUNE 30, 2011 AND 2010

**CASH CHANGES BETWEEN THIS YEAR AND LAST**

CASH BALANCE SAME MONTHEND THIS YEAR page 1	1,181,913.60	
CASH BALANCE SAME MONTHEND LAST YEAR page 1	1,178,487.69	
NET CHANGE OVER LAST YEAR INCREASE/(DECREASE)		<u><u>3,425.91</u></u>

**HOW IT HAPPENED**

		<u>YEAR END INFO</u>
GAIN/(LOSS) BALANCE OF LAST YEAR page 4 & year end info	(0.00)	106,524.65
PLUS NON CASH DEPRECIATION page 4 & year end info	0.00	48,306.20
GAIN/(LOSS) TO DATE THIS YEAR page 4	(36,907.04)	
PLUS NON CASH DEPRECIATION page 4	32,445.27	
(INCREASE)/DECREASE IN ACCOUNTS RECEIVABLE page 2	195,006.64	
(INCREASE)/DECREASE IN INVENTORY page 2	101,615.51	
(INCREASE)/DECREASE IN PREPAID EXPENSE page 2	(1,784.93)	
EQUIPMENT PURCHASED BALANCE OF LAST YEAR page 5 & yearend	0.00	(48,296.30)
EQUIPMENT PURCHASED THIS YEAR page 5	(2,316.91)	
INCREASE/(DECREASE) IN LIABILITIES page 2	(193,235.53)	
INCREASE/(DECREASE) IN RESTRICTED FUNDS page 2	(91,397.10)	
TOTAL OF ALL CHANGES		<u><u>3,425.91</u></u>

**GENERAL EXPENSE DETAIL**

ACCREDITATION	2,687.61
BAD DEBT EXPENSE	0.00
ENTERTAINMENT	5,193.25
INSERVICE TRAINING	1,905.00
INSURANCE--GENERAL	25,286.07
MISCELLANEOUS EXPENSE	39,021.46
CONTRCTUAL SERVICES	64,035.24
FUND RAISING COST	0.00
DISBURSEMENT OF RESTRICTED DONATIONS	13,450.00
NEWSLETTER & PERIODICAL SUBS	0.00
PROFESSIONAL DUES AND FEES	41,101.34
SOCIAL ACTIVITIES	3,034.10
TEST & KEY PRODUCTION	2,116.15
TRAVEL	113,981.34
TOTAL GENERAL EXPENSE	<u><u>311,811.56</u></u>

# GRIGGS UNIVERSITY

## BUDGET COMPARISON WITH CURRENT OPERATIONS

For 12 Months Ended Jun 30, 2011

	Total Budget	Total Actual	Elementary	Junior High	High School	College	Graduate
<b>Operating Summary</b>							
<b>Educational Departments</b>							
Income	2,615,921.00	2,204,178.23	116,292.77	51,729.10	754,657.16	716,915.75	564,583.45
Expense	3,239,557.00	2,911,183.55	376,753.38	163,338.72	1,094,458.48	853,245.88	423,387.09
Net Gain/(Loss)	<b>(623,636.00)</b>	<b>(707,005.32)</b>	<b>(260,460.61)</b>	<b>(111,609.62)</b>	<b>(339,801.32)</b>	<b>(136,330.13)</b>	<b>141,196.36</b>
<b>Other Services</b>							
<b>Bookstore</b>							
Income	65,000.00	19,324.85	(2,115.87)	745.49	3,516.07	17,183.17	(4.01)
Expense	275,008.00	274,200.77	128,006.47	15,260.41	86,665.34	44,189.03	79.52
Net Gain/(Loss)	<b>(210,008.00)</b>	<b>(254,875.92)</b>	<b>(130,122.34)</b>	<b>(14,514.92)</b>	<b>(83,149.27)</b>	<b>(27,005.86)</b>	<b>(83.53)</b>
<b>Quick Print Service</b>							
Income	210,000.00	107,800.40					
Expense	326,205.00	215,304.66					
Net Gain/(Loss)	<b>(116,205.00)</b>	<b>(107,504.26)</b>					
<hr style="border-top: 1px dashed black;"/>							
<b>Total Griggs Operating</b>							
Income	2,890,921.00	2,331,303.48					
Expense	3,840,770.00	3,400,688.98					
Gain/(Loss) before GC subsidy	<b>(949,849.00)</b>	<b>(1,069,385.50)</b>					
<b>General Conference Appropriations</b>							
Tithe Appropriations	63,666.00	108,692.00					
Non Tithe Appropriations	201,600.00	201,610.00					
Specials for Operation	250,000.00	280,395.46					
Rent (Subsidy in Kind)	445,000.00	441,781.00					
Total GC Appropriations	960,266.00	1,032,478.46					
Net Gain/(Loss)	10,417.00	<b>(36,907.04)</b>					

**GRIGGS UNIVERSITY**  
**BUDGET COMPARISON WITH CURRENT OPERATIONS**  
 For 12 Months Ended Jun 30, 2011

**Operating Income Details**

**Educational Departments**

	Total Budget	Total Actual	Elementary	Junior High	High School	College	Graduate
<b>Income from Enrollments</b>							
Gross Tuition Income	1,285,556.00	1,096,505.41	114,910.60	39,754.45	367,022.11	570,648.25	4,170.00
Job Corps	120,000.00	136,995.00			136,995.00		
Late Fees & Service Charges	12,028.00	10,518.75	554.97	246.86	3,601.36	3,421.26	2,694.30
Cancellation Fees	15,406.00	23,720.00	870.00	1,570.00	13,445.00	7,835.00	0.00
Technology Fees		41,890.50			41,890.50		
Discounts	3,780.00	8,308.53	92.03	0.00	0.00	8,216.50	0.00
Deferred Tuition	(14,563.00)	(66,076.95)	2,354.46	(9,666.40)	(33,130.68)	(28,553.33)	2,919.00
Visa Mastercard Fees	22,502.00	22,216.50	1,172.15	521.39	7,606.39	7,225.99	5,690.58
Payments to Contractors	102,600.00	103,800.77			103,800.77		
Net Tuition Income	1,318,671.00	1,241,380.81	112,716.93	50,716.32	588,478.26	491,214.58	(1,745.28)

**Other Educational Income**

Contractual Services	0.00	0.00			0.00		
Affiliation Fees	1,180,000.00	919,642.80	1,299.00	0.00	151,403.80	211,665.00	555,275.00
Total Other Educational Income	1,180,000.00	919,642.80	1,299.00	0.00	151,403.80	211,665.00	555,275.00
Total Direct Educational Income	2,498,671.00	2,161,023.61	114,015.93	50,716.32	739,882.06	702,879.58	553,529.72

**Other Income**

Interest on Bank Deposits	1,000.00	1,618.05					
Interest on Plant Fund	9,000.00	17,956.93					
Miscellaneous	4,000.00	3,649.64					
Contributions	3,500.00	3,480.00					
Contrib Released from Restricted	97,500.00	13,450.00					
MISC OTHER GRANTS	2,250.00	3,000.00					
Gain/(Loss) on Equipment							
Total Other Income	117,250.00	43,154.62	2,276.84	1,012.78	14,775.10	14,036.17	11,053.73
Total Educational Dept Income	2,615,921.00	2,204,178.23	116,292.77	51,729.10	754,657.16	716,915.75	564,583.45

## BUDGET COMPARISON WITH CURRENT OPERATIONS

For 12 Months Ended Jun 30, 2011

### Operating Income Details

#### Bookstore

	Total Budget	Total Actual	Elementary	Junior High	High School	College	Graduate
Gross Sales of Student Supplies	320,000.00	245,172.15	114,454.90	13,644.85	77,490.40	39,510.90	71.10
Less: Cost of Goods Sold	255,000.00	225,723.80	116,570.77	12,899.36	73,850.83	22,327.73	75.11
Less: Inventory Written off		123.50	0.00	0.00	123.50	0.00	0.00
Add: Misc Income:		0.00					
Net Income from Bookstore	65,000.00	19,324.85	(2,115.87)	745.49	3,516.07	17,183.17	(4.01)
<b>TOTAL Student Tuition and Bookstore</b>	<b>1,383,671.00</b>	<b>1,260,705.66</b>	<b>110,601.06</b>	<b>51,461.81</b>	<b>591,994.33</b>	<b>508,397.75</b>	<b>(1,749.29)</b>

#### Temporarily Restricted Funds

	Beginning Balance	Receipts	Disbursements	Current Balance
Worthy Student Fund	131.32	1,852.14	1,817.50	165.96
African Student Funds	2,332.50	1,000.00	3,332.50	0.00
Tanzania Project Funds	7,228.02	1,650.00	8,300.00	578.02
Funds Received from General Conf	450,626.43		102,449.24	348,177.19
New Elementary Curriculum Dev	77,354.30	20,000.00	0.00	97,354.30
Various Projects	400.00			400.00
Technology Projects	0.00		0.00	0.00
China Project	2,425.00	0.00		2,425.00
<b>Total</b>	<b>540,497.57</b>	<b>24,502.14</b>	<b>115,899.24</b>	<b>449,100.47</b>

**Elementary**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	99,106.07	107,889.00
MEDICAL ALLOWANCES	26,353.66	3,810.00
SOCIAL SECURITY EXPENSE	7,490.76	8,254.00
RETIREMENT FUND	12,683.08	16,467.00
MEDICAL INSURANCE	1,848.47	2,556.00
SURVIVOR INSURANCE	203.40	236.00
WAGE RELATED EXPENSE	265.17	239.00
LESSONS GRADING	0.00	0.00
COURSE DEVELOPMENT EXP	89,948.75	43,923.00
ACADEMIC SUPPORT	51,648.78	47,247.00
FINANCIAL MANAGEMENT	10,114.93	10,633.00
DEVELOPMENT & PR	0.00	5,912.00
DATA PROCESSING (COMPU)	13,664.36	15,677.00
MARKETING	18,673.57	23,068.00
ADMINISTRATIVE OVERHEAD	39,156.99	48,437.00
SHIPPING COSTS	5,595.39	6,742.00
MISC SUPPLIES & EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>376,753.38</b>	<b>341,090.00</b>

**Grades 7 and 8**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	0.00	0.00
MEDICAL ALLOWANCES	0.00	0.00
SOCIAL SECURITY EXPENSE	0.00	0.00
RETIREMENT FUND	0.00	0.00
MEDICAL INSURANCE	0.00	0.00
SURVIVOR INSURANCE	0.00	0.00
WAGE RELATED EXPENSE	0.00	0.00
LESSONS GRADING	16,597.49	14,872.00
COURSE DEVELOPMENT EXP	4,653.22	14,641.00
ACADEMIC SUPPORT	103,297.56	94,494.00
FINANCIAL MANAGEMENT	4,499.30	4,988.00
DEVELOPMENT & PR	0.00	2,956.00
DATA PROCESSING (COMPU)	6,078.15	7,355.00
MARKETING	8,306.34	10,822.00
ADMINISTRATIVE OVERHEAD	17,417.73	22,725.00
SHIPPING COSTS	2,488.93	3,163.00
MISC SUPPLIES & EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>163,338.72</b>	<b>176,016.00</b>

**Grades9 to 12**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	95,871.82	101,275.00
MEDICAL ALLOWANCES	1,435.02	1,043.00
SOCIAL SECURITY EXPENSE	7,220.61	7,762.00
RETIREMENT FUND	12,479.86	15,518.00
MEDICAL INSURANCE	1,715.43	410.00
SURVIVOR INSURANCE	223.79	273.00
WAGE RELATED EXPENSE	218.43	218.00
LESSONS GRADING	140,897.83	126,246.00
COURSE DEVELOPMENT EXP	87,725.26	111,638.00
ACADEMIC SUPPORT	180,770.72	165,363.00
FINANCIAL MANAGEMENT	65,638.64	58,415.00
DEVELOPMENT & PR	0.00	2,957.00
DATA PROCESSING (COMPU)	88,671.94	86,128.00
MARKETING	121,178.15	126,730.00
ADMINISTRATIVE OVERHEAD	254,100.90	266,107.00
SHIPPING COSTS	36,310.08	37,040.00
MISC SUPPLIES & EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>1,094,458.48</b>	<b>1,107,123.00</b>

**College**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	64,902.13	95,732.00
MEDICAL ALLOWANCES	2,173.67	5,219.00
SOCIAL SECURITY EXPENSE	4,864.15	7,335.00
RETIREMENT FUND	8,271.18	14,757.00
MEDICAL INSURANCE	961.22	1,994.00
SURVIVOR INSURANCE	105.82	179.00
WAGE RELATED EXPENSE	134.27	189.00
LESSONS GRADING	23,305.18	20,882.00
COURSE DEVELOPMENT EXP	30,159.20	42,093.00
ACADEMIC SUPPORT	180,770.73	165,364.00
FINANCIAL MANAGEMENT	62,355.98	59,177.00
DEVELOPMENT & PR	0.00	2,956.00
DATA PROCESSING (COMPU)	84,237.34	87,251.00
MARKETING	115,117.87	128,382.00
ADMINISTRATIVE OVERHEAD	241,392.98	269,575.00
SHIPPING COSTS	34,494.16	37,523.00
MISC SUPPLIES & EXPENSE	0.00	0.00
TRAVEL EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>853,245.88</b>	<b>938,608.00</b>

**Graduate Program**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	0.00	0.00
MEDICAL ALLOWANCES	0.00	0.00
SOCIAL SECURITY EXPENSE	0.00	0.00
RETIREMENT FUND	0.00	0.00
MEDICAL INSURANCE	0.00	0.00
SURVIVOR INSURANCE	0.00	0.00
WAGE RELATED EXPENSE	0.00	0.00
LESSONS GRADING	0.00	0.00
COURSE DEVELOPMENT EXP	19.20	29,282.00
ACADEMIC SUPPORT	0.00	0.00
FINANCIAL MANAGEMENT	49,106.40	65,841.00
DEVELOPMENT & PR	0.00	0.00
DATA PROCESSING (COMPU)	66,338.35	97,076.00
MARKETING	90,657.29	142,839.00
ADMINISTRATIVE OVERHEAD	190,101.11	299,933.00
SHIPPING COSTS	27,164.74	41,749.00
MISC SUPPLIES & EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>423,387.09</b>	<b>676,720.00</b>

**Editorial Department**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	119,512.89	132,055.00
MEDICAL ALLOWANCES	8,269.78	4,717.00
SOCIAL SECURITY EXPENSE	9,029.28	10,113.00
RETIREMENT FUND	15,515.61	20,253.00
MEDICAL INSURANCE	3,855.92	6,391.00
SURVIVOR INSURANCE	423.75	590.00
WAGE RELATED EXPENSE	439.11	458.00
OFFICE SUPPLIES		0.00
MISC SUPPLIES & EXPENSE	151.04	0.00
TRAVEL EXPENSE	0.00	1,000.00
COURSE AUTHORS	51,821.22	60,000.00
COURSE DEV SUPPLIES	3,487.03	6,000.00
<b>TOTAL</b>	<b>212,505.63</b>	<b>241,577.00</b>

**Academic Record Keeping**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	349,711.86	332,420.00
MEDICAL ALLOWANCES	52,501.36	14,765.00
SOCIAL SECURITY EXPENSE	26,445.84	25,439.00
RETIREMENT FUND	45,667.16	50,955.00
MEDICAL INSURANCE	9,479.09	10,992.00
SURVIVOR INSURANCE	1,044.17	1,015.00
WAGE RELATED EXPENSE	1,089.63	21,882.00
OFFICE SUPPLIES		
TRAVEL EXPENSE	28,432.53	7,000.00
TESTS & KEYS	2,116.15	8,000.00
MISCELLANEOUS EXPENSE	0.00	0.00
<b>TOTAL</b>	<b>516,487.79</b>	<b>472,468.00</b>

**Shipping Department**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	39,256.51	43,015.00
MEDICAL ALLOWANCES	4,914.41	3,871.00
SOCIAL SECURITY EXPENSE	2,969.41	3,288.00
RETIREMENT FUND	5,116.76	6,582.00
MEDICAL INSURANCE	924.27	1,278.00
SURVIVOR INSURANCE	101.75	118.00
WAGE RELATED EXPENSE	77.40	65.00
OFFICE SUPPLIES	172.43	500.00
POSTAGE & SHIPPING COSTS	84,190.70	144,500.00
EQUIP LEASE & REPAIR	5,257.00	0.00
TRAVEL EXPENSE	1,782.26	3,000.00
DEPARTMENTAL SUPPLIES & EXP	2,740.14	
MISCELLANEOUS EXPENSE	757.10	
LESS: REC'D FROM STUDENTS	(42,206.84)	(80,000.00)
<b>TOTAL</b>	<b>106,053.30</b>	<b>126,217.00</b>

**Financial**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	137,590.06	141,478.00
MEDICAL ALLOWANCES	4,911.45	4,178.00
SOCIAL SECURITY EXPENSE	10,407.42	10,836.00
RETIREMENT FUND	17,863.07	21,696.00
MEDICAL INSURANCE	2,366.08	3,272.00
SURVIVOR INSURANCE	260.29	302.00
WAGE RELATED EXPENSE	341.97	292.00
OFFICE SUPPLIES		0.00
AUDITING COST	14,988.00	15,000.00
TRAVEL EXPENSE	2,986.91	2,000.00
MISCELLANEOUS EXPENSE		0.00
<b>TOTAL</b>	<b>191,715.25</b>	<b>199,054.00</b>

**Marketing**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	132,350.35	167,677.00
MEDICAL ALLOWANCES	5,900.53	50,659.00
SOCIAL SECURITY EXPENSE	10,009.39	12,773.00
RETIREMENT FUND	17,088.73	25,746.00
MEDICAL INSURANCE	3,696.97	6,324.00
SURVIVOR INSURANCE	406.80	552.00
WAGE RELATED EXPENSE	290.13	391.00
OFFICE SUPPLIES	0.00	0.00
TRAVEL EXPENSE	2,804.56	9,500.00
ADVERTISING EXPENSE	32,771.75	60,000.00
PRINTED MATERIAL	47,768.27	65,000.00
HOME SCHOOL CONVENTIONS	315.00	10,000.00
WEBSITE DEVELOPMENT	18,170.00	15,000.00
MISC AD & PROMOTIONS	85,047.48	7,500.00
MISC MARKETING EXPENSE	(2,686.74)	2,500.00
<b>TOTAL</b>	<b>353,933.22</b>	<b>433,622.00</b>

**Development and PR**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	0.00	0.00
MEDICAL ALLOWANCES	0.00	0.00
SOCIAL SECURITY EXPENSE	0.00	0.00
RETIREMENT FUND	0.00	0.00
MEDICAL INSURANCE	0.00	0.00
SURVIVOR INSURANCE	0.00	0.00
WAGE RELATED EXPENSE	0.00	0.00
OFFICE SUPPLIES		0.00
TRAVEL EXPENSE	0.00	0.00
DEVELOPMENT SUPPLIES & EXF	0.00	13,000.00
MISCELLANEOUS EXPENSE		0.00
<b>TOTAL</b>	<b>0.00</b>	<b>13,000.00</b>

**Data Processing**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	164,105.67	174,177.00
MEDICAL ALLOWANCES	7,338.40	14,355.00
SOCIAL SECURITY EXPENSE	12,441.28	13,335.00
RETIREMENT FUND	21,338.42	26,665.00
MEDICAL INSURANCE	2,313.76	3,834.00
SURVIVOR INSURANCE	491.50	590.00
WAGE RELATED EXPENSE	17,855.68	531.00
OFFICE SUPPLIES	0.00	0.00
REPAIR AND MAINTENANCE	492.50	3,000.00
TRAVEL EXPENSE	0.00	0.00
DEPRECIATION EXPENSE	20,213.78	30,000.00
SOFTWARE & UPGRADES	12,184.65	25,000.00
MISCELLANEOUS EXPENSE	214.50	2,000.00
<b>TOTAL</b>	<b>258,990.14</b>	<b>293,487.00</b>



**Administrative**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	180,456.57	256,605.00
MEDICAL ALLOWANCES	3,639.59	21,512.00
SOCIAL SECURITY EXPENSE	13,581.84	19,604.00
RETIREMENT FUND	23,467.93	39,582.00
MEDICAL INSURANCE	4,410.42	8,896.00
SURVIVOR INSURANCE	484.73	808.00
WAGE RELATED EXPENSE	630.74	770.00
ACCREDITATION	2,687.61	2,000.00
BAD DEBT EXPENSE	0.00	5,000.00
ENTERTAINMENT	5,193.25	10,000.00
IN SERVICE TRAINING	1,905.00	1,000.00
INSURANCE EXPENSE	25,286.07	26,000.00
MISCELLANEOUS EXPENSE	39,021.46	30,000.00
CONTRACTUAL SERVICES	64,035.24	70,000.00
DISBURSE RESTRICTED FUNDS	13,450.00	97,500.00
OFFICE SUPPLIES	78,607.46	60,100.00
MEMBERSHIPS/CONVENTIONS	41,101.34	32,500.00
SOCIAL ACTIVITIES	3,034.10	6,000.00

(CONT'D ON NEXT COLUMN)

**Bookstore**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	30,713.83	32,927.00
MEDICAL ALLOWANCES	4,914.36	3,871.00
SOCIAL SECURITY EXPENSE	2,321.67	2,519.00
RETIREMENT FUND	3,990.53	5,030.00
MEDICAL INSURANCE	924.24	1,278.00
SURVIVOR INSURANCE	101.65	118.00
WAGE RELATED EXPENSE	77.39	65.00
OFFICE SUPPLIES	820.00	0.00
MISCELLANEOUS EXPENSE		0.00
RENT EXPENSE	110,337.10	109,200.00
ADMINISTRATIVE OVERHEAD	120,000.00	120,000.00
<b>TOTAL</b>	<b>274,200.77</b>	<b>275,008.00</b>

**Administrative cont'd**

	actual	budget
<b>EXPENSE</b>		
TELEPHONE	13,208.10	20,000.00
TRAVEL EXPENSE	79,757.34	52,500.00
DEPRECIATION	11,618.16	19,000.00
OFFICE RENT AND REPAIR	459,737.93	455,000.00
LESS:DISTRIB TO PRINTSHOP	(16,400.00)	(24,600.00)
LESS:SALARY REBATE	(2,850.00)	(1,000.00)
LESS:RENT DISTRIBUTION	(183,895.17)	(182,000.00)
LESS:DISTRIB TO BOOKSTORE	(120,000.00)	(120,000.00)
<b>TOTAL</b>	<b>742,169.71</b>	<b>906,777.00</b>
<b>TRANSITION EXPENSE</b>		
TRANSITION EXPENSE	102,449.24	0.00

**Quick Print Services**

	actual	budget
<b>EXPENSE</b>		
SALARY AND ALLOWANCES	38,869.54	50,450.00
MEDICAL ALLOWANCES	795.87	2,000.00
SOCIAL SECURITY EXPENSE	2,957.14	3,860.00
RETIREMENT FUND	4,645.27	6,800.00
MEDICAL INSURANCE	1,240.04	2,775.00
SURVIVOR INSURANCE	118.65	220.00
WAGE RELATED EXPENSE	90.29	500.00
OFFICE SUPPLIES		100.00
EQUIPMENT MAINT & REPAIR	0.00	1,000.00
SUPPLIES & OTHER EXPENSE	76,016.46	160,000.00
TELEPHONE	400.00	600.00
EQUIPMENT DEPRECIATION	613.33	1,000.00
MISCELLANEOUS EXPENSE	0.00	100.00
ADMINISTRATIVE OVERHEAD	16,000.00	24,000.00
RENT EXPENSE	73,558.07	72,800.00
<b>TOTAL</b>	<b>215,304.66</b>	<b>326,205.00</b>

# GRIGGS UNIVERSITY

## BUDGET COMPARISON WITH CURRENT OPERATIONS

FOR 12 MONTHS ENDED JUN 30, 2011

	THRU MAY11	ONLY JUN11	THRU JUN11	% OF ACTUAL OVER BUDGET	TOT BUDGET
<b>OPERATING INCOME</b>				(100.00% OF YEAR IS EXPIRED)	
<b>INCOME FROM ENROLLMENTS:</b>					
GROSS TUITION INCOME	1,179,073.16	96,317.75	1,275,390.91	90.7392%	1,405,556.00
LATE FEES & SERVICE CHARGES	11,768.75	(1,250.00)	10,518.75	87.4522%	12,028.00
CANCELLATION FEES	20,605.00	3,115.00	23,720.00	153.9660%	15,406.00
LESS: DISCOUNTS	9,138.85	(830.32)	8,308.53	219.8024%	3,780.00
DEFERRED TUITION	(27,996.99)	(38,079.96)	(66,076.95)	453.7317%	(14,563.00)
UNPAID TUITION		0.00		0.0000%	0.00
VISA/MASTERCARD FEES	20,048.64	2,167.86	22,216.50	98.7312%	22,502.00
PAYMENTS TO CONTRACTORS	92,109.35	11,691.42	103,800.77	101.1703%	102,600.00
NET TUITION INCOME	1,118,147.06	123,233.75	1,241,380.81	94.1388%	1,318,671.00
GROSS STUDENT SUPPLIES	212,993.10	32,179.05	245,172.15	76.6163%	320,000.00
COST OF MATERIAL	179,715.66	46,131.64	225,847.30	88.5676%	255,000.00
NET INCOME SUPPLIES	33,277.44	(13,952.59)	19,324.85	29.7305%	65,000.00
TOTAL INCOME FROM ENROLLMENTS	1,151,424.50	109,281.16	1,260,705.66	91.1131%	1,383,671.00
<b>ACADEMIC SERVICES FEE</b>	799,988.64	119,654.16	919,642.80	77.9358%	1,180,000.00
<b>OTHER OPERATING INCOME</b>					
INVESTMENT INCOME--BANK DEPOSITS	1,523.18	94.87	1,618.05	161.8050%	1,000.00
INVESTMENT INCOME--GC PLANT FUND	17,946.24	10.69	17,956.93	199.5214%	9,000.00
SUBSIDIES IN KIND--GC RENT/PHONE		0.00		0.0000%	0.00
MISCELLANEOUS INCOME	1,649.64	2,000.00	3,649.64	91.2410%	4,000.00
TOTAL OTHER OPERATING INCOME	21,119.06	2,105.56	23,224.62	165.8901%	14,000.00
<b>MISC GRANTS/CONTRIBUTIONS/&amp; OTHER ITEMS</b>					
CONTRIBUTIONS	3,315.00	165.00	3,480.00	99.4286%	3,500.00
CONTRIB: RELEASED FROM RESTRICTIC	98,190.16	(84,740.16)	13,450.00	13.7949%	97,500.00
CONTRACTUAL SERVICES	0.00	0.00	0.00	0.0000%	0.00
MISC OTHER GRANTS	3,000.00	0.00	3,000.00	133.3333%	2,250.00
N1 PRINTSHOP	107,800.40	0.00	107,800.40	51.3335%	210,000.00
NET OTHER NON CREDIT SALES	0.00	0.00	0.00	0.0000%	0.00
GAIN/(LOSS):EQUIP & INVENTORY ADJ	0.00	0.00	0.00	0.0000%	0.00
TOTAL OTHER OPERATING INCOME	212,305.56	(84,575.16)	127,730.40	40.7759%	313,250.00
<b>TOTAL OPERATING INCOME</b>	2,184,837.76	146,465.72	2,331,303.48	80.6422%	2,890,921.00
<b>APPROPRIATIONS</b>					
GENERAL CONFERENCE--TITHE	95,883.00	12,809.00	108,692.00	170.7222%	63,666.00
GENERAL CONFERENCE--NON TITHE	184,809.00	16,801.00	201,610.00	100.0050%	201,600.00
GENERAL CONFERENCE--SPECIAL	258,861.71	21,533.75	280,395.46	112.1582%	250,000.00
GENERAL CONF:RENT SUBSIDY	404,599.00	37,182.00	441,781.00	99.2766%	445,000.00
TOTAL APPROPRIATIONS	944,152.71	88,325.75	1,032,478.46	107.5200%	960,266.00
<b>TOTAL INCOME</b>	3,128,990.47	234,791.47	3,363,781.94	87.3440%	3,851,187.00

# GRIGGS UNIVERSITY

## BUDGET COMPARISON WITH CURRENT OPERATIONS

FOR 12 MONTHS ENDED JUN 30, 2011

	THRU MAY11	ONLY JUN11	THRU JUN11	% OF ACTUAL OVER BUDGET	TOT BUDGET
<b>OPERATING EXPENSES</b>					
<b>SALARIES AND ALLOWANCES:</b>					
SALARIES AND PERSONAL ALLOW	1,294,948.88	118,628.88	1,413,577.76	89.1707%	1,585,250.00
LESS: SALARY & ALLOWANCE REBATE	(2,850.00)	0.00	(2,850.00)	285.0000%	(1,000.00)
MEDICAL CLAIMS	102,978.66	20,169.44	123,148.10	94.7293%	130,000.00
RETIREE ALLOWANCES		0.00		0.0000%	0.00
<b>TOTAL SALARIES &amp; ALLOW</b>	<b>1,395,077.54</b>	<b>138,798.32</b>	<b>1,533,875.86</b>	<b>89.4780%</b>	<b>1,714,250.00</b>
<b>EMPLOYEE RELATED EXPENSES:</b>					
SURVIVOR INSURANCE FEES	3,644.25	322.05	3,966.30	79.3260%	5,000.00
MEDICAL INSURANCE	30,903.21	2,832.70	33,735.91	67.4718%	50,000.00
SOCIAL SECURITY (GU PORTION)	100,722.51	9,016.28	109,738.79	87.7068%	125,120.00
RETIREMENT BENEFIT EXPENSE	166,522.02	21,605.58	188,127.60	75.2360%	250,050.00
OTHER WAGE RELATED EXPENSE	20,874.99	324.84	21,199.83	84.7993%	25,000.00
REVIEW SUBSCRIPTIONS	310.38	0.00	310.38	51.7300%	600.00
CONTRACTUAL ITEMS	0.00	0.00	0.00	0.0000%	0.00
<b>TOTAL EMPLOYEE RELATED EXPENSE</b>	<b>322,977.36</b>	<b>34,101.45</b>	<b>357,078.81</b>	<b>78.3463%</b>	<b>455,770.00</b>
<b>TEACHERS' EXPENSES:</b>					
GRADING LESSONS	158,741.04	17,575.24	176,316.28	110.1977%	160,000.00
SUPPLIES & MISCELLANEOUS	3,878.54	605.68	4,484.22	224.2110%	2,000.00
<b>TOTAL TEACHERS' EXPENSE</b>	<b>162,619.58</b>	<b>18,180.92</b>	<b>180,800.50</b>	<b>111.6052%</b>	<b>162,000.00</b>
<b>COURSE DEVELOPMENT</b>					
MANUSCRIPT WORK	42,909.74	8,911.48	51,821.22	86.3687%	60,000.00
SUPPLIES & MISC	3,058.64	579.43	3,638.07	60.6345%	6,000.00
<b>TOTAL COURSE DEVELOPMENT</b>	<b>45,968.38</b>	<b>9,490.91</b>	<b>55,459.29</b>	<b>84.0292%</b>	<b>66,000.00</b>
<b>DEPRECIATION EXPENSE</b>					
OFFICE EQUIP & FURNISHINGS	11,618.16	0.00	11,618.16	61.1482%	19,000.00
COMPUTER EQUIPMENT	20,213.78	0.00	20,213.78	67.3793%	30,000.00
PRINTSHOP	613.33	0.00	613.33	61.3330%	1,000.00
<b>TOTAL DEPRECIATION EXPENSE</b>	<b>32,445.27</b>	<b>0.00</b>	<b>32,445.27</b>	<b>64.8905%</b>	<b>50,000.00</b>
<b>RENT &amp; EQUIPMENT MAINTENANCE</b>					
OFFICE RENT	422,545.24	37,192.69	459,737.93	101.2639%	454,000.00
OFFICE EQUIPMENT	0.00	0.00	0.00	0.0000%	1,000.00
<b>TOTAL MAINTENANCE EXPENSE</b>	<b>422,545.24</b>	<b>37,192.69</b>	<b>459,737.93</b>	<b>101.0413%</b>	<b>455,000.00</b>

<b>GRIGGS UNIVERSITY</b>						PAGE 03 OF 04	
<b>BUDGET COMPARISON WITH CURRENT OPERATIONS</b>							
FOR 12 MONTHS ENDED JUN 30, 2011							
			THRU MAY11	ONLY JUN11	THRU JUN11	% OF ACTUAL OVER BUDGET	TOT BUDGET
<b>EXPENSE CONTINUED</b>							
<b>MARKETING EXPENSE</b>							
	ADVERTISING EXPENSE		24,584.25	8,187.50	32,771.75	54.6196%	60,000.00
	PRINTED MATERIAL		38,478.27	9,290.00	47,768.27	73.4896%	65,000.00
	HOMESCHOOL CONVENTIONS		315.00	0.00	315.00	3.1500%	10,000.00
	WEBSITE DEVELOPEMENT		18,170.00	0.00	18,170.00	121.1333%	15,000.00
	MISC MARKETING EXPENSE		73,741.99	8,618.75	82,360.74	823.6074%	10,000.00
	<b>TOTAL MARKETING EXPENSE</b>		<b>155,289.51</b>	<b>26,096.25</b>	<b>181,385.76</b>	<b>113.3661%</b>	<b>160,000.00</b>
<b>GENERAL EXPENSE</b>							
	ACCREDITATION		2,500.00	187.61	2,687.61	134.3805%	2,000.00
	BAD DEBT EXPENSE		0.00	0.00	0.00	0.0000%	5,000.00
	DATA PROCESSING SUPPORT		12,891.65	0.00	12,891.65	42.9722%	30,000.00
	ENTERTAINMENT		4,009.15	1,184.10	5,193.25	51.9325%	10,000.00
	INSERVICE TRAINING		1,905.00	0.00	1,905.00	190.5000%	1,000.00
	INSURANCE--GENERAL		23,242.65	2,043.42	25,286.07	97.2541%	26,000.00
	AUDITING COST		14,988.00	0.00	14,988.00	99.9200%	15,000.00
	MISCELLANEOUS EXPENSE		37,234.86	1,786.60	39,021.46	130.0715%	30,000.00
	CONTRCTUAL SERVICES		58,698.97	5,336.27	64,035.24	91.4789%	70,000.00
	FUND RAISING COST		0.00	0.00	0.00	0.0000%	13,000.00
	DISBURSEMENT OF RESTRICTED DONA		10,900.00	2,550.00	13,450.00	53.8000%	25,000.00
	OFFICE SUPPLIES		55,377.56	24,049.90	79,427.46	132.3791%	60,000.00
	NEWSLETTER PUBLISH & PERIODICAL SUBS			0.00		0.0000%	100.00
	GOALQUEST CONTRACT		0.00	0.00	0.00	0.0000%	72,500.00
	PROFESSIONAL DUES AND FEES		37,569.83	3,531.51	41,101.34	126.4657%	32,500.00
	SHIPPING SUPPLIES & EXPENSE		50,062.62	2,630.17	52,692.79	81.0658%	65,000.00
	SOCIAL ACTIVITIES		2,981.81	52.29	3,034.10	50.5683%	6,000.00
	TEST & KEY PRODUCTION		1,956.19	159.96	2,116.15	26.4519%	8,000.00
	TELEPHONE & TELEX		8,094.12	5,113.98	13,208.10	66.0405%	20,000.00
	TRAVEL		77,785.06	36,196.28	113,981.34	151.9751%	75,000.00
						0.0000%	0.00
	<b>TOTAL GENERAL EXPENSE</b>		<b>487,487.63</b>	<b>84,822.09</b>	<b>485,019.56</b>	<b>85.6774%</b>	<b>566,100.00</b>
<b>DEDUCTION TO ELIMINATE DUPLICATIONS</b>							
	PRINTSHOP SHARE OF EXPENSE		(94,204.67)	(6,213.99)	(100,418.66)	87.6598%	(114,555.00)
	<b>TOTAL OPERATING EXPENSE</b>		<b>3,139,296.51</b>	<b>348,682.63</b>	<b>3,400,688.98</b>	<b>88.5419%</b>	<b>3,840,770.00</b>
	<b>NET INCOME (LOSS) current year</b>		<b>(10,306.04)</b>	<b>(113,891.16)</b>	<b>(36,907.04)</b>	<b>-354.2962%</b>	<b>10,417.00</b>
<b>TRANSITION RELATED EXPENSE AND FUNDING</b>							
	TRANSITION EXPENSE				102,449.24		
	FUNDED FROM GC SPECIAL RESERVE				(102,449.24)		

<b>GRIGGS UNIVERSITY</b>								PAGE 04 OF 04
<b>BUDGET COMPARISON WITH CURRENT OPERATIONS</b>								
FOR 12 MONTHS ENDED JUN 30, 2011								
			THRU MAY11	ONLY JUN11	THRU JUN11	% OF ACTUAL OVER BUDGET	TOT BUDGET	
<b>NOTES</b>								
<b>NOTE 01 -- PRINTING DEPARTMENT OPERATION</b>								
	PRINTING INCOME		107,800.40	0.00	107,800.40	51.3335%	210,000.00	
							0.00	
	LESS: SALARY AND ALLOWANCES		38,869.54	0.00	38,869.54	77.0457%	50,450.00	
	MEDICAL ALLOWANCES		532.71	263.16	795.87	39.7935%	2,000.00	
	SOCIAL SECURITY EXPENSE		2,957.14	0.00	2,957.14	76.6098%	3,860.00	
	RETIREMENT FUND		4,645.27	0.00	4,645.27	68.3128%	6,800.00	
	WAGE RELATED EXPENSE		90.29	0.00	90.29	18.0580%	500.00	
	MEDICAL INSURANCE		1,240.04	0.00	1,240.04	44.6861%	2,775.00	
	SURVIVOR INSURANCE		118.65	0.00	118.65	53.9318%	220.00	
	OFFICE SUPPLIES		0.00	0.00	0.00	0.0000%	100.00	
	EQUIP MAINT REPAIR		0.00	0.00	0.00	0.0000%	1,000.00	
	SUPPLIES & OTHER EXP		76,016.46	0.00	76,016.46	47.5103%	160,000.00	
	TELEPHONE		400.00	0.00	400.00	66.6667%	600.00	
	INTEREST ON LOAN		0.00	0.00	0.00	0.0000%	0.00	
	EQUIPMENT DEPRECIATION		613.33	0.00	613.33	61.3330%	1,000.00	
	MISCELLANEOUS EXPENSE		0.00	0.00	0.00	0.0000%	100.00	
	RENT		67,607.24	5,950.83	73,558.07	101.0413%	72,800.00	
	ADMINISTRATIVE OVERHEAD		16,000.00	0.00	16,000.00	66.6667%	24,000.00	
	TOTAL EXPENSE		209,090.67	6,213.99	215,304.66	66.0029%	326,205.00	
	NET PRINTING DEPT GAIN/(LOSS)		(101,290.27)	(6,213.99)	(107,504.26)	92.5126%	(116,205.00)	



