

Overview of the North American Division of Seventh-day Adventists' Position on Accounting and School Management Software in K-12 Schools

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The North American Division (NAD), over the past ten or more years, has struggled to find and implement a standardized set of software for both accounting and school management. This document is intended to give a brief history of the situation and to share the philosophical as well as practical reasons behind the software choices available.

Historical Background: The Adventist educational system has a long and unique history when it comes to system organization and standards. It is the only private educational system that has a hierarchical structure to help schools large or small with school administration. The current system of school registers can be traced back to that used by some of the first Adventist schools.

In recent years, however, there has been a need to streamline the process of recording grades and attendance as well as standardizing accounting software. In the past ten years, due to the explosive growth of technology, school administrators and teachers have been asking for an electronic method of keeping grades and attendance. The need has also been expressed for a standardized accounting system that can be used for all schools K-12.

One of the difficulties that slowed the progress of implementation of standardized software was the fact that there was no standardized software, or even standardized hardware, in the schools. Complicating the situation further was the fact that the needs of small schools were very different from those of large K-12 schools or academies. Trying to find software that met the needs of all was difficult. In 2000 the NAD Office of Education began a process of developing a customized package of software for small schools. This package was called **ASM**—Adventist School Management—and was designed for small schools. A financial package and a separate yet integrated school management module were also included.

Upon completion of the ASM package, the software was sent to the field for testing. After several months of use in the field a committee evaluated the ASM bundle and determined that the financial software was viable, but the school management portion of the package was not useable. A total rewrite of the ASM financial product was completed in November of 2003 and released to the field.

At the same time as the NAD Office of Education was working on ASM for small schools, they were also evaluating the plethora of software companies that produce financial and school management software for schools. After much consideration by both the Office of Education and the NAD Information Technology Department, a company called **Hunter Systems** was contracted to provide school management software for K-12

schools, both small and large, and to provide a financial package for schools that were looking for alternatives to their existing software. Hunter Systems is the largest provider of school management software for private schools in North America. They are willing and have the resources to help the NAD customize the software to meet the needs of K-12 schools. A contract was signed in July 2003 with Hunter Systems as the **NAD Vendor of Choice**. This means that the NAD will work with Hunter Systems as the vendor of choice in the future as we customize and expand the capabilities of the software bundles. As we can oversee the customization of only one software package, the NAD chose Hunter Systems. The actual vote to grant Hunter the designation of vendor of choice was made by union presidents and treasurers.

There are many other good software packages on the market, including Redaker (Administrator Plus), Sassy, Blackbaud, and many others. The NAD does not discourage the use of these other packages except to say we will not support the development or customization of any other package except Hunter Systems. Also, we encourage schools to stay as unified as possible with school-management software so we can begin to work toward Web-based reporting. If a school is using another package and is happy with the results, the NAD is not encouraging change unless the school sees merit in that change.

The NAD is working on a regular basis with Hunter Systems to upgrade and refine the customization of the software. We have included in the Hunter financial bundle a seamless module for **Adventist Defined Contributions** for retirement and a net-asset program for **depreciation**. There are other refinements coming, and the goal is to provide a Web-based reporting system for all schools K-12 in the next two years.

Regarding financial packages, there has been much confusion and many players in the Adventist market due to the fact that there has been no standardization, or unity, in development. Below are the **approved financial packages** and a brief description of each.

Overview of Approved Software Packages

Financial Packages:

LUCIS (Lake Union Conference Information System): This package, as the name denotes, has been developed by the Lake Union Conference and is used by a number of unions for both conference office and school finances. The package has recently been upgrade to a Windows environment and can be integrated with Hunter Systems Bundle Two (see following description of Hunter Systems).

SUN Systems: This software package has been purchased by the General Conference to meet the accounting needs of unions, conferences, and, in some cases, large academies. It is very complex, and the support mechanism calls for the unions to support the conference offices and the academies. The difficulty is that only some unions are using SUN. This means that if a school is in a union that does not use SUN, there is no direct support for that academy. We do not

recommend or support schools using SUN unless their union and local conference are also using SUN.

ASM (Adventist School Management): This package written for the NAD is a financial package designed only for small schools (1-3 teachers). The package has been used in larger schools (up to 200 students) but is not designed to meet the complexities of larger schools. It was written so treasurers in small schools with limited expertise in the field of accounting can still produce statements and balance sheets that meet accounting standards. There are tutorials, help files, downloadable upgrades, and video clips to help clarify processes on the ASM Web site: www.ucollege.edu/asm. This package will continue to be upgraded annually.

School Management (This includes Bundle Three of Hunter, which has a financial package.):

Hunter Systems: This package is available in three different bundles. Each bundle is developed to meet the particular needs of schools depending on their size and type of program.

Bundle One: GradeQuick—This is the industry standard in electronic grade-book software. The NAD has worked with the company to customize GradeQuick to include many of the NAD-required forms, such as opening and closing reports, baptism records, etc.

Bundle one is designed for small schools only (1-3 teachers) and can be used as a partner with ASM to provide both financial and school-management software for small schools. GradeQuick is a stand-alone product designed to be installed on one machine at a time. There is no on-line component for GradeQuick at this time, although this is one of the directions the NAD is heading.

Bundle Two: This bundle is designed for medium- to large-sized schools (4 teachers and above) that already have a financial package in place. It is school-management software only and is not a financial package (although there is a great billing program in Bundle Two). Bundle Two can be integrated with LUCIS software if that is the financial package used by the school.

Bundle Two consists of two parts: School Minder Professional With Billing and a network version of GradeQuick. There are many more customized reports available in the program, and the NAD is continuing to work with Hunter Systems to increase the Adventist customization. The program seamlessly integrates grades, attendance, student records, parent records, and faculty records into one program. There is an optional program called **Edline**, which will place grades, attendance, missing

assignments, lesson plans, and much more information in a secure Web-based environment.

Bundle Three: This bundle incorporates all of Bundle Two and adds an integrated financial package. The financial package has an Adventist global chart of accounts and built-in defined contributions and net-asset program written by the NAD IT department. If a school is looking for a total package, then Bundle Three is recommended. Edline is an option that would place financial information as well as Bundle Two information in a secure Web-based environment.

Conclusions: The NAD is striving to develop a system of reporting finances and school management that is consistent across the division. This would allow personnel to transfer from school to school without being required to learn new systems. It would also allow the NAD to develop Web-based reporting tools that are standardized and can be used by all schools. We need a critical mass of schools using the same software package in order to negotiate, from a position of strength, with a software company regarding customization. It is much easier to convince the software company to make a change if there are 100 schools using a particular program than if there are 10 schools using it.

If there are questions or concerns regarding educational software, please contact:

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