



## Adventist Education

**NOTE:** The committee below developed this rubric and has used it to effectively evaluate two schools and a conference-wide secondary education program. The rubric aided the committee in generating a report with recommendations that helped guide conference and school administrators in making solid decisions relative to short and long-term outcomes. Much was learned by the committee each time they used the rubric. To benefit from their experience in how to effectively use the rubric or gain the services of this committee to aid in training others while utilizing this tool contact:

Jim Ingersoll

Southern Union Associate Director for Secondary Education

Cell (770)846-7222

email - [jingersoll@southernunion.com](mailto:jingersoll@southernunion.com)

### **COMMITTEE MEMBERS:**

**Chair - Jim Ingersoll** - Southern Union Associate Director for Secondary Education

**Debra Fryson** - Southern Union Director for Education

**Rick Anderson** - Principal, Mount Pisgah Academy

**Greg Gerard** - Principal, Georgia Cumberland Academy

**Conrad Gill** - Retired Southern Union Director of Education

**Marc Grundy** - Southern Adventist University Associate Vice President for Enrollment Services

**Richard Hallock** - Retired Conference President

**Doug Hilliard** - Kentucky/Tennessee Conference Treasurer

**Leslie Louis** - Carolina Conference President

**Gerald Kovalski** - Retired North American Division Vice President for Education

**Arne Nielsen** - North American Division Director for Secondary Education

**Kevin Kossick** - Georgia Cumberland Conference Vice President for Education

**Jim Epperson** - Retired Conference Vice President for Integrated Ministries



## ACADEMY OPERATIONAL HEALTH RUBRIC



---

**Name of Academy**

---

**Date of Visit**

The primary purpose of this rubric is to assist a conference in performing an in-depth review of an academy's overall operation in relationship to its viability. The rubric differs from an accreditation evaluation by focusing on issues outside the purview of accreditation and is prescriptive. A committee selected by the union office of education will meet on the campus and utilize the rubric as the centerpiece of an in-depth report to the conference administration and academy board. This committee of no more than 12 individuals is comprised of division, union, conference, academy and college administrators, along with other education consultants.

**Committee members and titles:**

- |    |     |
|----|-----|
| 1. | 6.  |
| 2. | 7.  |
| 3. | 8.  |
| 4. | 9.  |
| 5. | 10. |

## RATIONALE

Maintaining healthy and financially viable academies is of utmost importance in these changing times. In particular, conferences are experiencing major difficulties funding their boarding academies for a number of reasons: a diminishing tithing base, declining enrollment, ineffective leadership and management. Over time these types of challenges put some boarding academies in a downward spiral causing conferences to agonize over their long-term viability. Boarding academy closings have become more frequent but no less painful. Most of the time academy closings have not been completed in a manner that enables its assets to be used in a beneficial way. Some boarding academy closings have burdened conferences with ongoing significant expenses with no apparent end in sight.

## INSTRUCTIONS

1. This is a fill-in PDF document to facilitate completion and by confining space for writing, it makes it necessary for issues and recommendations to be succinct.
2. When you enter numerical ratings they are automatically tallied in the total box of each section and the grand total at the end. A final percentage score is also automatically calculated as numerical ratings are added.
3. It works best to divide the committee into teams of two and disperse the nine sections among those teams.
4. It is very important to have a conference treasurer and an academy treasurer on the team.
5. If at all possible do an online survey of parents before the visit and then interview all students and staff to get input and understanding from all stakeholder groups.
6. Preparatory work and a minimum of two days onsite is required to effectively apply this rubric, identify issues and write meaningful recommendations.

## CONTENTS

Administration/Personnel	Page 1
Finances	Page 2
Enrollment	Page 3
Academy Board	Page 4
Marketing & Recruitment	Page 5
Facilities & Infrastructure	Page 6
Curriculum & Technology	Page 7
Constituency	Page 8
Accreditation	Page 9
Committee Summation	Page 10



## ACADEMY HEALTH RUBRIC INFORMATION



<b>Name of academy</b>		<b>Address</b>			
<b>Principal</b>		<b>Type of academy Only Check One Box <input checked="" type="checkbox"/></b>	Boarding <input type="checkbox"/>	Day Academy 9-12 <input type="checkbox"/>	Day Academy K-12 <input type="checkbox"/>
<b>Conference</b>		<b>Superintendent</b>			
<b>Number of Constituent Churches</b>		<b>Number of Constituents</b>			
<b>Current Enrollment</b>		<b>Enrollment Last Year</b>			
<b>Number of FTE Administrative Staff</b>		<b>Number of FTE Instructional Staff</b>			
<b>Number of Part-Time Instructional Staff (Head Count)</b>		<b>Number of Auxiliary/ Classified Staff (Head Count)</b>			
<b>Evaluation Dates</b>	<b>Last Full-Scale Evaluation</b>	<b>Next Full Evaluation</b>	<b>Next Interim</b>	<b>or</b>	<b>Next Revisit</b>

## ADMINISTRATION & PERSONNEL

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Three or more principal changes in five years	No principal changes within three years	No principal changes within five years	
2.	Annual faculty turnover	No faculty changes in two years	No faculty changes in three years	
3.	50% or more staff turnover in three years	26 to 49% staff turnover in three years	25% or less staff turnover in three years	
4.	No written short and long-term improvement plans	Short and long-term written improvement plans exist with little or no implementation	Short and Long-term written improvement action plans exist and implemented with annual academy board reviews	
5.	Administration is working independently of the academy board and conference	Administration tends to inform the academy board and conference without seeking sufficient input and consensus building	Administration seeks sufficient input from academy board and conference to build consensus for effective implementation	
6.	Academy is facing serious litigation and/or criminal prosecution resulting in a damaged reputation	Academy inconsistently implements governing policies, laws and regulations and is vulnerable to litigation	Academy is in compliance with all governing policies, laws and regulations	
7.	Administration fails to initiate and/or maintain appropriate and consistent evaluation processes for personnel	Administration performs personnel evaluations on an irregular basis	Administration annually conducts both informal and formal evaluations of all personnel (within 90 days for new personnel)	
8.	Instructional program is staffed largely by uncertified and/or unqualified personnel	Not all teachers and staff are certified/qualified	All teachers and staff are certified/qualified and are provided professional growth opportunities	
9.	Administration lacks vision and strategic planning	Administration has developed a vision statement with little stakeholder input	Administration articulates a clear vision and has developed a strategic plan in collaboration with stakeholders	
<b>Total possible = 27 points</b>			<b>POINTS SCORED</b>	

**ADMINISTRATION & PERSONNEL – List: Observations, Issues, and Recommendations in this section only. If a score of “0” is given a comment is required.**

## FINANCES

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Conference gross tithe invested into secondary education exceeds 6%	Conference gross tithe invested into secondary education is 5 – 6%	Conference gross tithe invested into secondary education is 5% or less	
2.	Conference special appropriations beyond their normal annual subsidy exceeds \$1,000,000 over five years to balance the school budget	Conference special appropriations beyond their normal annual subsidy does not exceed \$500,000 over five years to balance the school budget	Conference special appropriations beyond their normal annual subsidy does not exceed \$100,000 over five years to balance the school budget	
3.	Auditors have requested a letter of financial backing from the Conference Executive Committee for the academy to operate for one or more years	Auditors have given the academy the status of a going concern.	Auditors have given a clear report for the financial health of the academy	
4.	The academy has an accounts payable to the conference that is more than 120 days in arrears	The academy has accounts payable to the conference that is no more than 120 days in arrears	The academy is current with their accounts payable to the conference	
5.	The academy has collected 85% or less of student accounts receivables for more than two years	The academy has collected 86 to 95% of student accounts receivables for more than two years	The academy has collected over 95% of student accounts receivables for more than two years	
6.	The academy has an accounts payable to vendors that exceeds 60 days of due date for more than one year	The academy has accounts payable to vendors that is 30 to 60 days of due date for more than one year	The academy has accounts payable that has been current for more than one year to all vendors	
7.	The academy has been in at-fault litigation multiple times over a five year period and/or is in pending at-fault litigation	The academy has two or less potentially at-fault litigious incidents over a five year period	The academy has no pending at-fault litigation or incidents that may result in litigation over a five year period	
8.	Ten percent or less of student wages comes from outside sources	Eleven to 39% of student wages come from outside sources	Forty percent or more of student wages come from outside sources	
9.	Student tuition is unrealistically low to fund operating expenses	Tuition is competitive but does not adequately fund operating expenses	Tuition is competitive and adequately funds operating expenses	
10.	The academy has not been able to balance the budget for the last three years or more	The academy has not balanced their budget in either one of the past two years	The academy has had a balanced budget for the past two years as well as the present year	
11.	The academy has not been able to fund depreciation for five or more years	The academy has been able to fund depreciation for three or more years in the past five years	The academy has successfully funded depreciation for five or more school years	

12.	The academy has had little or no working capital for five or more years	The academy has had 50 to 74% of the required denominational working capital for two or more years in the past five years	The academy has maintained 75% or more of the required denominational working capital	
13.	More than 50% of students are international and or out-of-conference	26 to 49% of students are international and/or out-of-conference	25% or less of students are International and/or out-of-conference	
14.	The academy has no development program and is dependent on a single non-conference source	The academy has a development program and is increasingly dependent upon a small number of donors and/or non-conference sources	The academy has an active development program with many donors and/or non-conference sources	
		<b>TOTAL POSSIBLE POINTS = 42</b>	<b>POINTS SCORED</b>	

**FINANCES - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**





## ENROLLMENT



	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Enrollment declined by more than 35% over the past five years with no realistic prospects for increase	Not meeting enrollment projections and/or experiencing enrollment decline	Meeting or exceeding incremental enrollment goals over the past 5 years	
2.	In-conference dorm population is less than 40% for more than 3 years	In-conference dorm population is 41-59% for more than 3 years	In-conference dorm population is 60% or above for more than 3 years	
3.	Declining enrollment has caused a work force reduction that has affected the integrity of curricular offerings	Enrollment is negatively affecting the ability to maintain sufficient certified teachers and/or is requiring teachers to carry heavier class loads	Enrollment provides the financial strength to meet denominational teacher certification requirements and class load recommendations	
4.	Declining enrollment has caused work-force flight due to job insecurity	Unstable enrollment creating uncertainty and anxiety amongst work force	Enrollment stability provides for job security and commitment to the academy	
5.	Declining enrollment makes it difficult to attract and/retain qualified staff	Unstable enrollment limits the academy's ability to attract and maintain highly qualified staff	Strong enrollment enables the academy to maintain and attract highly qualified staff	
6.	Not meeting enrollment goals despite recruiting efforts to both SDA and non-SDA markets	Enrollment patterns reflect the acceptance of more non-SDA students than SDA over a 3-5 year period to "keep the doors open"	Strong enrollment enables the academy to provide the education experience primarily to SDA students and be more selective in the admission process	
7.	Academy's current culture and values have caused the loss of constituency support	The academy, with the support and involvement of its constituency, is in the process of restoring the SDA culture and values	Academy's SDA culture and values inspires the ongoing support of its constituency	
8.	Student retention is decreasing from a 3-year average as a result of inadequate academy program and/or poor customer service	Student retention is maintained at a 3-year average	Student retention is increasing from a 3-year average	
9.	Less than 50% of enrollment is able to meet their financial obligations	50 - 80% of enrollment is able to meet their financial obligations	More than 80% of enrollment is able to meet their financial obligations	
<b>Total possible = 27 points</b>			<b>POINTS SCORED</b>	

**ENROLLMENT** - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.

## ACADEMY BOARD

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Board is not supportive of the mission and vision of the academy	Board is aware of the mission and vision of the academy, but is not actively involved	Board is actively involved in creating and supporting the mission and vision of the academy	
2.	Board shows little or no interest in the governance of the academy	Board and administration are engaged only during regularly scheduled meetings	Board and administration partner in the governance of the academy	
3.	Board micromanages the academy	Board is sporadically involved in the management of the academy	Board works in a team relationship with the principal as the leader of the academy	
4.	Board is disconnected with what is going on in the academy program	Board has limited knowledge and participation in the academy program	Board is aware and visible in the academy program	
5.	Board has received no in-service regarding its purpose and function	Board is in-serviced on a sporadic basis	Board receives in-service on regular intervals (new board members receive in-service upon appointment to the board)	
6.	Few board members support the academy with personal finances or philanthropic activity (less than 70%)	Board members occasionally support the academy with personal finances or philanthropic activity (less than 100%)	Board members regularly support the academy with personal finances or philanthropic activity (100%)	
<b>Total possible = 18 points</b>			<b>POINTS SCORED</b>	

**ACADEMY BOARD - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**

## MARKETING & RECRUITMENT

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	No written marketing/recruitment plan in place that includes elements such as: brand identity, marketing collaterals, advertising, SWOT analysis, and retention	Has a written marketing/recruitment plan in place that includes elements such as: brand identity, marketing collaterals, advertising, SWOT analysis, and retention	Fully implements the written marketing and recruitment plan that includes elements such as: brand identity, marketing collaterals, advertising, SWOT analysis, and retention	
2.	Stakeholders are negative/reluctant towards promoting the academy	Stakeholders are supportive but not excited about promoting the academy	Stakeholders believe in and are passionate about promoting the academy	
3.	Poor/Outdated website	Adequate website that is updated periodically	Vibrant website that is updated regularly	
4.	Academy is not communicating or interacting effectively with their constituents	Academy puts forth occasional effort to communicate and interact with its constituents	Academy program reflects effective communication and interaction with its constituents	
		<b>Total possible = 12 points</b>	<b>POINTS SCORED</b>	

**MARKETING & RECRUITMENT - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**

## FACILITIES & INFRASTRUCTURE

Challenged (0/1 point)		Marginal (2 points)	Healthy (3 points)	Score
1.	Insufficient personnel to maintain facilities and grounds	Personnel assigned to maintenance and grounds, but not adequate to meet needs	Sufficient personnel to maintain facilities	
2.	Faculty housing rent is used in operating, causing deterioration of houses	Only urgent housing repairs can be made as rent income is largely allocated to academy operating	Faculty housing rent is allocated as needed to properly maintain housing	
3.	Capital improvements such as roads, sewage, heat/air, buildings and walkways are not maintained	Some major capital repairs take place, however cosmetic improvements are neglected	Capital improvements take place as part of multi-year strategic planning	
4.	No written master plan for facilities is in existence	Planning on an annual basis may take place, but long range plans are not developed	Campus master plans have been developed and implemented	
5.	No preventative maintenance is performed; crisis intervention characterizes campus maintenance	Maintenance of facilities takes place in an unorganized manner	Preventative maintenance is planned for and carried out	
		<b>Total possible = 15 points</b>	<b>POINTS SCORED</b>	

**FACILITIES AND INFRASTRUCTURE - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**

## CURRICULUM, INSTRUCTION & TECHNOLOGY

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	NAD Secondary curriculum standards are not utilized	NAD Secondary standards are utilized in some classes	NAD Secondary standards are utilized throughout the curriculum	
2.	Course offerings are not adequate to help students meet college entrance requirements	Basic course offerings exist that meet college entrance requirements	Full curriculum with AP and/or college credit courses are being offered	
3.	Standardized test scores and other educational success indicators are declining	Standardized test scores and other educational success indicators are static	Standardized test scores and other indicators of educational success have improved	
4.	Quality of instruction is perceived as unacceptable by stakeholders	Quality of instruction is marginal with few attempts at improvement	Quality of instruction is exemplary and progressive	
5.	Technology is antiquated or nonexistent	Technology is marginally adequate	All students and teachers have access to needed technology and is utilized	
6.	Technology is seldom integrated into the curriculum	Technology is occasionally integrated into the curriculum	Technology is intentionally used by teachers on a daily basis	
7.	There is no written plan in place for upgrading technology on campus	There is a written technology plan in place for upgrading as funds become available	A funded written technology plan is in place and being implemented	
<b>Total Possible = 21 points</b>			<b>POINTS SCORED</b>	

**CURRICULUM, INSTRUCTION AND TECHNOLOGY - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**

## CONSTITUENCY

(Measures of sentiment/loyalty/support)

	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Academy viability is in question by stakeholders	Stakeholders somewhat support the future viability of the academy	Stakeholders overwhelmingly support the future viability of the academy	
2.	Pastoral support of the academy is minimal	Pastors occasionally demonstrate public support of the academy	Pastors promote the academy from the pulpit, through academy activities, and through enrolling their eligible children in the constituent academy	
3.	No development/public relations person or written plan in place	Has a development/public relations person and/or a written plan in place	Development/public relations person in place who implements the written development plan with evident results	
4.	Stakeholders show little interest in contributing to the financial needs of the academy	Inconsistent contributions are given to the financial needs of the academy by stakeholders and others	Regular contributions are given to the financial needs of the academy by stakeholders and others	
5.	No annual surveys take place to gather feedback from students, parents, board members and pastors	Surveys are utilized occasionally to gather feedback from students, parents, board members and pastors	Annual surveys of students, parents, board members and pastors are utilized to impact school decisions	
		<b>Total possible = 15 points</b>	<b>POINTS SCORED</b>	

**CONSTITUENCY - List: Observations, Issues, and Recommendations in this section only. If a score of "0" is given a comment is required.**



## ACCREDITATION



	Challenged (0/1 point)	Marginal (2 points)	Healthy (3 points)	Score
1.	Probation status	Partial accreditation with a revisit	Maintains full accreditation	
2.	No regional accreditation	Documented regional accreditation application in process	Maintains regional accreditation	
3.	Major recommendations or action plans were not addressed	Major recommendations and action plans were partially completed	All major/minor recommendations and action plans were addressed or completed	
		<b>Total possible = 9 points</b>	<b>POINTS SCORED</b>	

**ACCREDITATION - List: Observations, Issues, and Recommendations in this section only. If a score of “0” is given a comment is required.**



# TEAM SUMMATION

	<b>POSSIBLE POINTS FOR RUBRIC = 186</b>	<b>TOTAL POINTS SCORED ON RUBRIC</b>			
		<b>Challenged 69% &amp; below</b>	<b>Marginal 70-84%</b>	<b>Healthy 85% +</b>	<b>Scored</b>

**TEAM SUMMATION:**