

JOSHUA A. GERLICK

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CURRICULUM VITAE

STATEMENT OF TEACHING PHILOSOPHY

My philosophy on teaching is that a student can only learn when knowledge is reciprocated by and among colleagues in the classroom. Whether this occurs online or in a physical context is irrelevant. Any pupil has the capacity to memorize a fact. When that fact is put into a tangible context and bits of information are made available for a practical application to life, knowledge is born. To not share knowledge is a travesty of the process through which information is transformed. Today, the conduits through which we exchange knowledge are wider and more free-flowing than ever in the history of the world. What we choose to know and the way we choose to learn is specific for every student. Therefore, it is the responsibility of the teacher to facilitate an environment wherein learning can be achieved according to the requirements of each individual. Furthermore, it is the responsibility of the learner to disseminate knowledge to others freely and without prejudice for any opinion. Thus, knowledge is reciprocated from one to another in a never-ending cycle.

EDUCATION

PhD in Management: Designing Sustainable Systems – 2022 (Currently Enrolled)

Case Western Reserve University – Weatherhead School of Management
Cleveland, OH

Doctor of Management Fowler Fellow, 2019 – Present

Doctor of Management Nonprofit Management Fellow, 2018 – Present

Master of Business Administration (MBA) – 2004

Carnegie Mellon University – Tepper School of Business
Pittsburgh, PA

GPA: 3.88

Concentrations (9 credit hours each) in:

- Communications
- E-Commerce
- Economics
- Entrepreneurship
- Finance
- Information Systems
- International Business
- Marketing
- Production & Operations Management
- Strategy

Bachelor of Science (BS) in Business Administration – 2003

Carnegie Mellon University – Tepper School of Business
Pittsburgh, Pennsylvania

Graduate with University Honors

CERTIFICATIONS & LICENSURES

AFP Certified Corporate FP&A Professional – March 2017

Industry-leading certification demonstrating expertise and competencies in budgeting, forecasting, financial modeling, corporate financial planning and financial analysis.

AFP Certified Treasury Professional (CTP) – January 2017

Industry-leading certification demonstrating expertise and competencies in corporate liquidity, capital and risk management.

CERTIFICATIONS & LICENSURES (CONTINUED)

Project Management Professional (PMP) Certification – August 2011

Globally recognized and independently validated credential for project management, proving experience, education and competency to successfully lead and direct projects.

CompTIA Security+ Certification – December 2010

International, vendor-neutral certification proving competency in system security, network infrastructure, access control and organizational security.

CompTIA Network+ Certification – March 2010

International, vendor-neutral certification proving a technician's competency in managing, maintaining, troubleshooting, installing and configuring network infrastructure.

CompTIA A+ Certification – September 2009

International, vendor-neutral certification proving competence in IT system installation, preventative maintenance, networking, security and troubleshooting.

HONORS & AWARDS

Inamori Ethics Prize Essay Competition (2nd Place – Graduate Student Division) – September 2018

Awarded to top University students for illustrating ethical leadership across a range of human endeavors.

Project Management Institute West Michigan Chapter Collegiate Competition (1st Place) – April 2012

*Awarded to a top University team for demonstrated expertise in project management.
Served as co-Champion to the team. Shared with Drs. Jaideep Motwani & Jean Nagelkirk.*

Illinois Mathematics & Science Academy Alumni Titan Award – June 2009

*Honors alumni, who through outstanding service to IMSA, advance the institution's mission and work.
Shared with Pooja Agarwal & Sendhil Revuluri.*

University of Colorado Venture Adventure (2nd Place) – April 2006

*Awarded to the best business venture, based upon written business plan and live presentation.
Served as Advisor to the team.*

Pittsburgh Technology Council Tech 50 Conference (Rising Star Finalist) – October 2004

*Awarded to top companies in Pittsburgh, PA who demonstrate tremendous future potential.
Shared with nine other Pittsburgh-area companies.*

Canfield-Roseman Entrepreneur of the Year Award – May 2004

Awarded to the top MBA graduate for excellence in entrepreneurship.

Entrepreneurship Enterprise Award with Distinction – May 2004

Awarded to a top MBA graduate for particular instances of outstanding achievement in entrepreneurship.

George & Alexis Vahanian Award for Communication – May 2004

Awarded to the top MBA graduate for outstanding ability and achievement in communication.

Global MOOT Corp. Competition (Grand Champion) – May 2004

*Awarded to a top global business venture from an initial applicant pool of over 5,000 competitors.
Shared with Yogesh Oka & Mark O'Leary.*

University of San Francisco Science Pioneer Award – April 2004

*Awarded to a team who has made a significant contribution to the commercialization of scientific research.
Shared with Yogesh Oka & Mark O'Leary.*

HONORS & AWARDS (CONTINUED)

Honeywell Aerospace Electronic Systems Growth Champion (1st Place) – March 2004

Awarded to a top team for converting Honeywell aerospace technologies into private-sector opportunities. Shared with Patrick Huang, Leo Leung, Yogesh Oka, and Saveen Pakala.

Pittsburgh Technology Council Business Plan Competition Phases I, II, and III (1st Place) – 2004

Awarded to the team who best writes a short-, medium-, and long-length technology business plan. First team to receive all three awards in a single year. Shared with Yogesh Oka & Mark O'Leary.

Boy Scouts of America Eagle Scout Award – 1998

Awarded upon completion of significant requirements in the areas of leadership, service, and outdoor skills. Earned by only approximately 5% of all Boy Scouts.

TEACHING EXPERIENCE

Associate Faculty: BUS 250: Corporate and Social Responsibility (10 Iterations), 2010-14

Ashford University

Online instruction. Undergraduate core & elective courses. Developed course materials and delivered lectures via eCollege asynchronous online learning management platform in small class formats. Advised non-traditional (professional & military) and adult students.

Adjunct Instructor: MGT 330: Entrepreneurship and Small Business Management (2 Iterations) 2009-12

ENT 250: Entrepreneurial Finance and Accounting

ENT 351: Entrepreneurship Project

MGT 303: Introduction to International Business

BUS 101: Introduction to Business (3 Iterations)

MGT 331: Concepts of Management (7 Iterations)

MGT 345: Team Building (2 Iterations)

Grand Valley State University

Offline (physical) instruction. Undergraduate core & elective courses. Developed entirely new course syllabi, planned lectures, developed course supplements on Blackboard online learning management system, and mentored over 320 students.

Substitute Teacher: Professional Education Services Group, LLC, 2009-11

High School Math, Science, and Social Science Classrooms throughout Western Michigan

Served as short- and long-term substitute for high school classrooms while conducting research on unique deployments of technology. Maintained a 5.0 / 5.0 teacher-feedback rating.

Co-Instructor: The Ecology of Entrepreneurship, 2007

Illinois Mathematics & Science Academy

An accelerated introduction to entrepreneurial idea generation, business fundamentals, start-up financing, marketing & sales, and strategic exit.

Graduate Teaching Assistant: High-Stakes Presentations, 2003-04

Carnegie Mellon University – Tepper School of Business

Advanced communication, structured on delivering individual and team persuasive presentations based upon the audience's actual needs and expectations, developing sound and convincing arguments, creating credibility via content and actions, and designing effective and persuasive multimedia visual aids.

Graduate Teaching Assistant: Written Communication, 2003-04

Carnegie Mellon University – Tepper School of Business

Introductory graduate-level course to help students develop the rhetorical, critical and strategic thinking abilities necessary for the managerial-level writing situations they will meet in the workplace.

TEACHING EXPERIENCE (CONTINUED)

Graduate Teaching Assistant: Oral Communication, 2003-04
Carnegie Mellon University – Tepper School of Business
Introductory graduate-level course designed to prepare students for the challenging demands of communicating strategically as leaders in formal business presentations.

Graduate Teaching Assistant: Technology Commercialization Workshop, 2003-04
Carnegie Mellon University – Tepper School of Business
Advanced capstone course in graduate-level entrepreneurship, designed to assist students in developing, funding, and launching a venture.

TEACHING INTERESTS

Concepts of Management
Oral/Written Communication
Microeconomic Theory

Business Ethics
Entrepreneurial Finance
International Business

Entrepreneurship
Team Building & Leadership
Strategic Decision-Making

HIGHLIGHTS OF WORK EXPERIENCE

Blue Lake Fine Arts Camp (2014 – 2018)

Twin Lake, Michigan

Michigan's largest provider of arts education to youth, annually serving more than 6,000 gifted elementary, junior high, and high school students with diverse programs in music, art, dance, and drama.

Director of Finance (March 2016 – August 2018)

Interim Director of Finance (March 2015 – February 2016)

Financial Systems Specialist (May 2014 – February 2015)

Developed financial systems, authored accountability protocols, and ensured compliance for \$11 million budget organization after leading the re-engineering of finance department.

- Directed strategic and tactical financial operations, including financial planning & analysis, cost accounting, and reporting. Spearheaded internal audit activities and oversaw external audit and financial report preparation. Modeled program analyses and provided recommendations to the Board.
- Reviewed and executed financial agreements on behalf of the organization. Led risk management programs for \$23 million property portfolio and 325+ campus structures. Oversaw internal control of compensation for 700+ employees. Advised on immigration and taxation of non-resident aliens.
- Authored capital improvement and operational support grant applications, resulting in annual appropriations from the National Endowment for the Arts, Corporation for Public Broadcasting, and State of Michigan. Ensured financial accountability and managed compliance audits.
- Analyzed and recommended short-term investments for cash and designated savings funds. Ensured tax and reporting compliance for complex donations and permanently-restricted endowment funds. Managed planned giving contracts and authorized disbursements for Charitable Gift Annuity program.
- Managed legal actions and compliance associated with the maintenance of 1,600-acre campus, including all property acquisition and divestiture activities. Resolved title disputes and zoning irregularities in a highly complex environment including management of riparian and mineral rights.
- Directed retail operations, increasing sales by 27% over a four-year period (exceeding \$1 million) by developing new sales channels for off-season revenue generation. Negotiated contracts with vendors, improving four-year gross margins by over 20%. Monitored procurement and production for 550 SKUs. Directed annual orientation activities, facilitated staff training (including food safety certification), oversaw license inspections, and supervised 35 seasonal retail employees.

HIGHLIGHTS OF WORK EXPERIENCE (CONTINUED)

Grand Valley State University (2009 – 12)

Grand Rapids, Michigan

Adjunct Instructor of Entrepreneurship and Management

Mentored students to develop sustainable business models and investor-ready plans and presentations. Continually revised entrepreneurship and international business curricula to reflect best teaching and learning practices, including multimedia instructional elements and competitive grading policies.

- Authored strategic plan for the Center for Entrepreneurship and Innovation to establish benchmarks and objectives in key performance areas, including expansion of the entrepreneurship academic curriculum, community-oriented outreach, and business plan competitions.
- Increased student performance by 57% in the studies of entrepreneurial finance and accounting by incorporating concurrent online instruction, allowing for 8 additional lectures and an expansion of the curriculum.
- Implemented “experience point” grading system within introductory “concepts-level” curricula, requiring students to compete for top grades, similar to online gaming environments; increased student quality output by over 75% over traditional curriculum methods.

EADevices, Inc. (2004 – 08)

Portage, Michigan

Global medical device company (spinout of Medrad, Inc.) specializing in safety needle devices.

Co-Founder / Chief Executive Officer

Oversaw all global operations and functions (subject to the Board) after assessing the market / medical potential of a new biopsy safety needle technology and negotiating a medical technology licensing agreement with Medrad. Devised a business plan and obtained \$2M in funding. Prepared product forecasts by leveraging stochastic models such as Monte Carlo simulations and game theory in cooperation with colleagues. Cultivated strong business relationships with vendors (including outsourcing), employees, and stakeholders.

- Positioned the company for projected 40% annual growth from 2004 through 2012 (in a \$3.5B market) by effectively managing business, technology, and product development programs.
- Generated over \$1M in initial savings by creating an advanced encrypted electronic-records management system enabling full online availability of documentation.
- Increased cross-market penetration through evangelization of early product adopters in bone marrow that facilitated expansion into breast biopsy space after diverging from conventional wisdom and selecting bone marrow biopsy as the company’s early entry market.
- Managed and expanded advisory teams from public and private healthcare sectors, increased collaborative university involvement, and served as community anchor for political leaders.

HIGHLIGHTS OF WORK EXPERIENCE (CONTINUED)

Various Contract Project Management (2004 – 2006)

Coordinated through Carnegie Mellon University from May 2004 until November 2006 when EADevices Inc. obtained venture capital financing.

Technology Transfer / Licensing Dispute

Led a spin-out effort and prepared a Private Placement Memorandum of Vibrance T.C., LLC from its original parent company. Resolved an intellectual property conflict between Vibrance T.C. and the primary inventor. Developed the product development protocol for new technologies and managed council in the development of a freedom-to-operate opinion. Wrote the business plan to appeal to early-stage technology investors. Scoped manufacturing requirements and vetted candidates. Led the procurement effort for a distribution partner, resulting in a partnership with a facility in Minnesota. Managed operations, resulting in \$1 million of quarterly sales and a 14% profit margin.

Management Team Coaching

Coached the founding team at Envivial, LLC to hone their business plan and presentation skills for early-stage investors. Translated a strictly marketing plan into a library of information about the company, including financial projections, strategic objectives, and tactical milestones. Engaged with early customers, including several Fortune 500 early adopters, to use and provide feedback on an initial product that allowed customers the ability to hold focus groups in a virtual environment, programmed with the Unreal gaming engine.

Assessment of Technology Feasibility

Determined the technological feasibility of an Azima, Inc. equipment health monitoring solution for wafer handlers in semiconductor fabrication facilities. Engaged with industry experts on the reliability, use, technical specification, and tolerance of existing equipment. Identified potential sensor technologies, procured manufacturing candidates, and calculated the financial pro forma analysis. Examined the potential for the company to use existing IP or whether acquisitions would be required. Determined that nearly \$10 million per year would be saved at each fabrication facility by reducing wafer handling errors and predicting machine fatigue. Recommended a partnership with existing technology providers to improve ROI by bundling sensor technology with improved robotic handlers.

Business Plan Development (within large enterprise)

Developed a plan to commercialize the Honeywell, Inc. Autonomous Vehicle Efficiency Control (AVEC) platform based on the actuator technology and emergency response controls built into the Airbus A380. Developed a use case for reducing fuel consumption and tire retreading in Class 8 semi-trucks using an adaptive efficiency system to decrease wind drag and optimize tire pressure based on weather, operation, and terrain conditions. Outlined product rollout to a potential \$60 billion market by first targeting existing fleet vehicles and following with OEM manufacturers.

SCHOLARLY PAPERS

Gerlick, Joshua A. (2004). **A dynamic model for examining individual IC: the intellectual capital navigator.**

Dheer, Vinay, Joshua A. Gerlick, Brad Nilson, Pradeep Walia (2003). **The strategic use of intellectual capital in universities.**

PRESENTATIONS / WORKSHOPS

- Gerlick, Joshua A. (2010). “**Leading and Succeeding with Generation Y.**” Workshop presentation at 2010 District 62 Toastmasters International Conference. November 20, 2010, Grand Rapids, MI.
- Gerlick, Joshua A. (2010), “**Reaching Your Customer: Market Sizing & Segmentation.**” Workshop presentation to students participating in the Grand Valley State University Teen Entrepreneurship Summer Academy, June 21, 2010, Grand Rapids, MI.
- Gerlick, Joshua A. and Paul Strasma (2007), “**The Ecology of Entrepreneurship.**” Conducted at 2007 Intersession at the Illinois Mathematics & Science Academy, January 2007, Aurora, IL.
- Gerlick, Joshua A. and Matthew Humphrey (2006-07), “**Lessons Learned in Entrepreneurship.**” Conducted in various classes instructed by Dr. Arthur Boni at Carnegie Mellon University, Pittsburgh, PA.
- Gerlick, Joshua A. (2004), “**On the Importance of Persistence.**” Keynote address presented for Convocation ceremonies at the Illinois Mathematics & Science Academy, August 22, 2005, Aurora, IL.
- Gerlick, Joshua A., Yogesh Oka, Mark O’Leary (2004), “**The Emergence of EADevices as a Model for Healthcare.**” Address made for the NASDAQ Stock Exchange opening bell ceremony, August 6, 2004, New York, NY.
- Gerlick, Joshua A. (2003-04), “**Keys to Effective Presentations.**” Conducted in various classes instructed by Claudia Kirkpatrick at Carnegie Mellon University, Pittsburgh, PA.

RESEARCH INTERESTS

Current research efforts are directed at phenomena occurring at the intersection of the experience economy, technology systems, and organizational learning. Specific topics include:

- the ethical and legal considerations of algorithmic design to autonomously enable personalized and dynamic pricing in consumer retail markets;
- the impact of learning outcomes achieved through experiential and competitive alternative education curricula and professional certification environments; and,
- the re-emergence of paternalistic management structures as validation or repudiation of the nonprofit organization fulfilling knowledge society’s call for citizenship.

SERVICE & ORGANIZATION LEADERSHIP

AIM2Flourish (www.aim2flourish.com), Volunteer Story Editor	2018 – Present
Toastmasters International Club #8177, Vice President, Membership	2011 – 2012
President	2010 – 2011
<i>* Competent Communicator Award – February, 2011</i>	
Illinois Mathematics & Science Academy, President’s Advisory Council	2004 – 2008