Annual Report

2009–2010

Report of the Board Chair
Message from the President
Treasurer’s Report
Statements of Financial Position
Statements of Activities
Statements of Cash Flows
NAIS Staff
NAIS Board of Directors
Advisory Task Forces
Donors
What is NAIS?
From superheroes to monumental opportunities, NAIS has had quite a year. Much of this year has centered on issues related to the economy. And while we are hopeful that we are coming out of the worst of these times, we continue to function in a state of cautious optimism.

This year’s Annual Conference was both moving and exhilarating! The conversations about how we advance our public purpose were intense and the board is excited about the many opportunities that are available for us to pursue. Forging the right partnerships for our future work is a priority as we simultaneously continue to advocate for independent education.

Here are some highlights of the year:

- As a result of collaboration of the board’s Equity and Justice Committee and the staff, NAIS launched the Heads Equity and Diversity Seminar (HEADS) Institute. It was an impressive gathering of heads of schools who shared methods and implementations of diversity work and inclusivity in our schools.
- The board continues to support our new services division, School and Student Services by NAIS. Our immediate task is to ensure the right governance structure for this division as it moves forward.
- We supported major changes in NAIS’s budget that resulted in reduced spending and more creativity in programming.
- In the areas of public policy and government relations, we are watching the potential for tax code revisions, education choices (charter schools, tax credits), and concern being voiced by our colleges and universities as it relates to the readiness of young people entering the working world.
- We continue to model and observe good governance as we shape our board with the right people to assist in our strategic work.

We are pleased that NAIS is in a great position fiscally. It is well positioned to ensure short and long term financial sustainability. As an organization, our future is bright. As the voice for independent education, we are determined to reiterate the message that the work in our schools is meaningful and continues to impact and change the lives of children.
The NAIS president’s report to the membership at Annual Conference always focuses a lens on the school year just past, the one we are in, and the one we will start soon. Not surprisingly, the three-year time span can create a pointillist painting of our recent, immediate, and emerging landscapes.

The Year Past (2009–2010)
The Annual Conference Theme in 2010 (San Francisco) was: “Adapt, Survive, and Thrive: Unleashing the Superpowers Within,” reflecting the Herculean and largely successful efforts of independent schools attempting to recover from the storm of the recession.

While my column for the summer 2009 issue of Independent School magazine was entitled “High Anxiety” — alluding to the Mel Brooks/Alfred Hitchcock spoof but reflecting the level of angst we felt about enrollments and charitable giving for the year ahead — the rest of the magazines in that volume, thankfully, returned to traditional educational issues and themes. These themes were not about the economy, but rather about schooling: “School as Community” (Winter 2010); “Beyond Test Prep” (Spring 2010); “Sexuality Education Today (Summer 2010). These magazines helped us look within to address important issues of educating and leading schools so that our “value proposition” in uncertain economic times remained relevant and vibrant.

As the Treasurer’s Report for FY2010 indicated at the Annual Meeting, NAIS remains in a position of continued strength financially, operationally, and programmatically. Our benchmarks for providing voluminous resources, services, analyses, and leadership seemed validated by continued growth and strength in membership (now 1,700 schools strong), while continuing to diversify our income stream so that membership dues remained at 38 percent of income for FY2010.
Always driven by the desire to provide increased value, the NAIS initiatives in school year 2009–2010 included the following:

- The 2010–2011 Trendbook for Independent Schools
- The NAIS 2009 State of Independent School Leadership report, the NAIS K-12 Online Learning: A Literature Review report, NAIS pulse surveys
- Cost Containment Strategies — A Literature Review
- 2008–2009 SAT Report
- Philanthropy in a Recession: History, Trends, and Best Practices
- The Demographic Snapshot Tool
- The NAIS Schools folder of videos on iTunes U,
- A new diversity offering (the summer HEADS conference), and
- A new Challenge 20/20 portal.

Additionally, NAIS published in 2009–2010:

- The Trustee’s Role in Fund-Raising,
- Penny-Wise: A Guide for Independent School Families (revised),
- Psyching Up for the Phonathon, and

The Year Present (2010–2011)

The theme of the 2011 Annual Conference in National Harbor, MD (across the Potomac River from our capital city, Washington, DC) was “Advancing our Public Purpose,” a theme that asked us to renew our commitment to “the public purpose of private education.” The theme was developed by the Spring 2011 issue of Independent School magazine, “Schools and the Common Good” and exemplified by the two recipients of the 2011 Diversity Award, Al Adams (head of school at Lick-Wilmerding School in
San Francisco) and Jim Scott (head of school at Punahou School in Honolulu) for their extraordinary leadership in the arena of civic engagement.

NAIS’s orchestration of an ongoing commitment to the theme includes the introduction of the Million Hours of Public Service campaign, which encourages schools to submit monthly, over the year, the numbers of hours of community service logged by their students and staff, and our ongoing encouragement of schools to connect with their local public schools. Through “prep for prep” activities — where independent and public school teachers collaborate in summer and weekend programming to raise the achievement horizons of underserved public school children — and other forms of mutually beneficial collaborations as offered by umbrella organizations and consultancies such as the National Partnership for Educational Access and Wingspan Partnerships — we believe NAIS schools can directly impact and improve the condition of local public schools.

The President’s Annual Report to the Membership at the Annual Conference centered on the themes of competitive challenges and promising developments, including:

- Weakening of the admissions funnel traceable to push-back on tuitions that now seem too high to a financially cautious public, a condition exacerbated by effective marketing by lower-priced schools competing publicly on the basis of price;
- Shrinking demographics of pre-school age children, the latter potentially a demographic trough working its way through our schools for the next decade;
- Competition from well-resourced for-profit schools like Avenues, The World School, in New York City, and growing successes by some charter schools;
• Emergence of powerful and expanding social media, posing both marketing opportunities for the nimble — with allies well-placed and plugged into the networks — and threats to all the extent that the crowd itself owns the discourse, not the school;

• Over-the-top parenting by tiger moms and aggressive dads, making us all welcome another round of much needed salvos from Wendy Mogel’s latest contribution to parenting guidance, The Blessings of a B Minus;

• The surge in digital Professional/Personal Learning Communities (PLCs) such as ISEnet (the Independent School Educator’s Network), where teachers are holding amazing conversations with a growing and global conclave of fellow professionals eager to explore the latest developments in teaching and learning;

• Encouraging experiments in non-tuition revenues by an expanding number of schools exploiting physical and intellectual and social capital by creating satellite campuses overseas, organizing consortia of schools to launch online enterprises (like
the Online School for Girls and the Global Online Academy), or using their physical assets in new ways (sold-out country music concerts in the school’s auditorium).

The Year Next (2011–2012)
Beyond the perennial and ongoing NAIS commitments (to data collection, research, advocacy, trend analysis, diversity, leadership training, Principles of Good Practice, and “thought leadership”), NAIS’s critical priorities for 2011–2012 will be:

• Redesigning the NAIS website;
• Reimagining StatsOnline;
• Expanding the investment in SSS’s infrastructure systems;
• Making high-tech-for-high-touch investments: Purchasing and implementing a new Association Management System (AMS), a new Customer Relationship Management System (CRM), and a new web Content Management System (CMS).

Emerging Priorities include:
• Creating a new Advocacy strategy and messages for marketing independent schools, driven by customer segmentation and trend research.
• Developing and sharing models and resources that give new insight into the five sustainabilities of schools of the future: demographic, financial, environmental, global, and programmatic.
• Articulating and developing a Schools of the Future strategy for NAIS’s work.

In the many ways that NAIS seeks to serve our schools, we deliberately intend to “reinvent the wheel” (or find a disruptive innovation to substitute for it) and to help schools to imagine doing so themselves.
A Jesuit in 17th century France advised that “money makes a good servant, but a poor master.” I am proud to report that, at NAIS, financial resources serve and advance our mission. The Finance Committee of the board worked closely together with the NAIS staff to ensure that NAIS resources are prudently managed and thoughtfully aligned with our purpose:

to serve as the voice of independent education, to promote high standards of educational quality, and to advocate for equity, justice, and accessibility.

Albert Einstein is credited with the quotation: “Not everything that counts can be counted, and not everything that can be counted, counts.”

There are some important indicators of our financial health that certainly count and that we can count:

We have continued to increase the value of NAIS membership to member schools.

The continued success of our initiatives and technological innovations over the past few years resulted in an operating surplus at the end of fiscal year 2009–2010. Total operating revenues exceeded operating expenses by $582,000. The long-term fund investment return had a gain of $791,000 due to market and global economic recovery. The change in net assets for the fiscal year is a gain of $1,373,000. Less than 33 percent of total NAIS revenue derives from member dues. The balance of annual operating revenues is generated by conferences, workshops, products, and services.

The following list of accomplishments in 2009–2010 can’t be quantified — but they count because they increase value of your membership in NAIS.

For example:

• We grew and developed the NAIS Services Division, created tutorial webinars, informational videos, and other online tools aimed at helping schools move towards financial sustainability.

• We have improved the Demographic Center and the Survey Builder. The new Demographic Snapshot quick report tool provides current demographic and economic profiles of your metropolitan area projected five years out. This useful tool can be used by your school’s leadership team to learn where, in your community, you have potential to grow enrollment.

• We have improved the functionality of the NAIS website and added a new web-based financial management feature to SSS services.

• We have supported your efforts in teacher recruitment and retention.

• We re-engineered and developed quick reports to make StatsOnline simpler to use.

• We continued to provide excellent NAIS publications, including our award-winning Independent School magazine.

We welcome your feedback regarding how NAIS can support your performance as a head and your work developing the leaders around you.

In closing, the Finance Committee and I congratulate Pat Bassett and his intrepid staff for a year of excellent performance, service to our schools, and leadership in our industry.

This is the value proposition offered by NAIS, and the promise of our association now, and in the future.

You can count on it.
## STATEMENTS OF FINANCIAL POSITION

**FOR THE YEARS ENDED JUNE 30,**

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CURRENT ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$9,762,781</td>
<td>$5,271,435</td>
</tr>
<tr>
<td>Short-term investments</td>
<td>0</td>
<td>1,098,621</td>
</tr>
<tr>
<td>Accounts receivable, net</td>
<td>21,244</td>
<td>58,835</td>
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<tr>
<td>Publications inventory, net of allowance of $109,627 in 2010 and $48,589 in 2009</td>
<td>220,964</td>
<td>224,204</td>
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<tr>
<td>Prepaids, deposits, and other assets</td>
<td>278,562</td>
<td>650,595</td>
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<tr>
<td><strong>TOTAL CURRENT ASSETS</strong></td>
<td><strong>$10,283,551</strong></td>
<td><strong>$7,303,690</strong></td>
</tr>
<tr>
<td><strong>FURNITURE, EQUIPMENT, AND SOFTWARE, NET</strong></td>
<td><strong>$1,229,196</strong></td>
<td><strong>$1,542,229</strong></td>
</tr>
<tr>
<td><strong>OTHER ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long-term investments</td>
<td>$6,197,816</td>
<td>$5,406,317</td>
</tr>
<tr>
<td>Investments related to deferred compensation</td>
<td>245,184</td>
<td>217,558</td>
</tr>
<tr>
<td><strong>TOTAL OTHER ASSETS</strong></td>
<td><strong>$6,443,000</strong></td>
<td><strong>$5,623,875</strong></td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$17,955,747</strong></td>
<td><strong>$14,469,794</strong></td>
</tr>
<tr>
<td><strong>LIABILITIES AND NET ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CURRENT LIABILITIES:</strong></td>
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<td></td>
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<tr>
<td>Accounts payable and accrued expenses</td>
<td>$1,203,402</td>
<td>$901,444</td>
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<tr>
<td>Deferred revenue</td>
<td>3,498,631</td>
<td>1,694,030</td>
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<tr>
<td>Deferred rent benefits - current portion</td>
<td>89,501</td>
<td>73,651</td>
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<tr>
<td><strong>TOTAL CURRENT LIABILITIES</strong></td>
<td><strong>$4,791,534</strong></td>
<td><strong>$2,669,125</strong></td>
</tr>
<tr>
<td><strong>OTHER LIABILITIES:</strong></td>
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<td></td>
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<tr>
<td>Deferred compensation</td>
<td>$297,184</td>
<td>$217,558</td>
</tr>
<tr>
<td>Deferred rent benefits - long term</td>
<td>152,555</td>
<td>242,054</td>
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<tr>
<td><strong>TOTAL OTHER LIABILITIES</strong></td>
<td><strong>$449,739</strong></td>
<td><strong>$459,612</strong></td>
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<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$5,241,273</strong></td>
<td><strong>$3,128,737</strong></td>
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<tr>
<td><strong>NET ASSETS</strong></td>
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<td></td>
</tr>
<tr>
<td>Unrestricted:</td>
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<td></td>
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<tr>
<td>Undesignated</td>
<td>$6,516,658</td>
<td>$4,699,508</td>
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<tr>
<td>Board designated</td>
<td>6,197,816</td>
<td>6,641,549</td>
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<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>$12,714,474</strong></td>
<td><strong>$11,341,057</strong></td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES AND NET ASSETS</strong></td>
<td><strong>$17,955,747</strong></td>
<td><strong>$14,469,794</strong></td>
</tr>
</tbody>
</table>
## Statements of Activities

For the years ended June 30, 2010 and 2009

### Revenue and Support

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues and subscriptions</td>
<td>$6,852,110</td>
<td>$6,701,105</td>
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<tr>
<td>Financial aid services</td>
<td>$5,552,583</td>
<td>$4,912,291</td>
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<tr>
<td>Conferences and workshops</td>
<td>$3,771,751</td>
<td>$4,017,692</td>
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<tr>
<td>Publications</td>
<td>$559,948</td>
<td>$652,783</td>
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<tr>
<td>Foundation and corporate support</td>
<td>$1,473,306</td>
<td>$1,759,085</td>
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<tr>
<td>Operating investment income</td>
<td>$12,680</td>
<td>$119,504</td>
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<tr>
<td>Other revenues</td>
<td>$123,933</td>
<td>$82,490</td>
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<tr>
<td>Long term fund draw</td>
<td>$0</td>
<td>$260,000</td>
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<tr>
<td><strong>Total Revenue and Support</strong></td>
<td>$18,346,311</td>
<td>$18,504,950</td>
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</table>

### Expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program expenses</td>
<td>$16,220,729</td>
<td>$16,560,404</td>
</tr>
<tr>
<td><strong>Supporting Services</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>$872,337</td>
<td>$539,285</td>
</tr>
<tr>
<td>Member development</td>
<td>$578,318</td>
<td>$622,893</td>
</tr>
<tr>
<td>Fund-raising</td>
<td>$92,734</td>
<td>$133,319</td>
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<tr>
<td><strong>Total Supporting Services</strong></td>
<td>$1,543,389</td>
<td>$1,295,497</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$17,764,118</td>
<td>$17,855,901</td>
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</table>

### Operating Surplus

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating surplus</td>
<td>$582,193</td>
<td>$649,049</td>
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</table>

### Non-operating Items

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term fund investment return, net</td>
<td>$791,224</td>
<td>$(1,507,156)</td>
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<tr>
<td>Transfer to operations</td>
<td>$0</td>
<td>$(260,000)</td>
</tr>
<tr>
<td><strong>Total Non-operating Items</strong></td>
<td>$791,224</td>
<td>$(1,767,156)</td>
</tr>
</tbody>
</table>

### Change in Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td>$1,373,417</td>
<td>$(1,118,107)</td>
</tr>
</tbody>
</table>

### Net Assets, Beginning of Year

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets, Beginning of Year</strong></td>
<td>$11,341,057</td>
<td>$12,459,164</td>
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</table>

### Net Assets, End of Year

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets, End of Year</strong></td>
<td>$12,714,474</td>
<td>$11,341,057</td>
</tr>
</tbody>
</table>
## STATEMENTS OF CASH FLOWS

### FOR THE YEARS ENDED JUNE 30

<table>
<thead>
<tr>
<th>Description</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CASH FLOWS FROM OPERATING ACTIVITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$1,373,417</td>
<td>$(1,118,107)</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash provided by operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>$706,096</td>
<td>$647,554</td>
</tr>
<tr>
<td>Loss (gain) on disposal of furniture and equipment</td>
<td>$2,374</td>
<td>$(1,782)</td>
</tr>
<tr>
<td>Unrealized (gain) loss on investments</td>
<td>$(602,278)</td>
<td>$1,704,552</td>
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<tr>
<td>Realized gain on investments</td>
<td>$(24,763)</td>
<td>0</td>
</tr>
<tr>
<td>Change in provision for bad debts</td>
<td>$(4,788)</td>
<td>$(4,364)</td>
</tr>
<tr>
<td>Change in inventory reserve</td>
<td>$61,038</td>
<td>$(51,489)</td>
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<tr>
<td><strong>Changes in assets and liabilities:</strong></td>
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<tr>
<td>Accounts receivable</td>
<td>$42,379</td>
<td>$76,301</td>
</tr>
<tr>
<td>Publications inventory</td>
<td>$(57,798)</td>
<td>$56,912</td>
</tr>
<tr>
<td>Prepaids, deposits, and other assets</td>
<td>$372,033</td>
<td>$(201,482)</td>
</tr>
<tr>
<td>Investments related to deferred compensation</td>
<td>$(27,626)</td>
<td>$8,730</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$301,958</td>
<td>$(1,138,027)</td>
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<tr>
<td>Deferred revenue</td>
<td>$1,804,601</td>
<td>$1,055,744</td>
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<tr>
<td>Deferred compensation</td>
<td>$79,626</td>
<td>$(28,730)</td>
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<tr>
<td>Deferred rent benefits</td>
<td>$(73,649)</td>
<td>$(58,144)</td>
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<tr>
<td><strong>NET CASH PROVIDED BY OPERATING ACTIVITIES</strong></td>
<td>$3,952,620</td>
<td>$947,668</td>
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<tr>
<td><strong>CASH FLOWS FROM INVESTING ACTIVITIES</strong></td>
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<td></td>
</tr>
<tr>
<td>Purchases of furniture, equipment, and software</td>
<td>$(395,437)</td>
<td>$(1,086,543)</td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sale/maturities of investments</td>
<td>$1,098,621</td>
<td>$562,770</td>
</tr>
<tr>
<td>Reinvested income from investments</td>
<td>$(164,458)</td>
<td>$(240,356)</td>
</tr>
<tr>
<td><strong>NET CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES</strong></td>
<td>$538,726</td>
<td>$(764,129)</td>
</tr>
<tr>
<td><strong>NET INCREASE IN CASH AND CASH EQUIVALENTS</strong></td>
<td>$4,491,346</td>
<td>$183,539</td>
</tr>
<tr>
<td><strong>CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR</strong></td>
<td>$5,271,435</td>
<td>$5,087,896</td>
</tr>
<tr>
<td><strong>CASH AND CASH EQUIVALENTS, END OF YEAR</strong></td>
<td>$9,762,781</td>
<td>$5,271,435</td>
</tr>
</tbody>
</table>
NAIS STAFF

This list reflects staff as of August 2011

COMMUNICATIONS TEAM
Edward Hoyt — Editor of Publications
Jen Lesar — Web Content Strategist
Myra McGovern — Senior Director of Public Information
Nancy Raley — Vice President, Communications
Kitty Thuermer — Director of Publications

FINANCE AND ADMINISTRATION TEAM
Efrem Abate — Staff Accountant
Janyce Bryant — Director of Administration and Facilities
Netty Ford — Accounts Receivable Manager
Francois Innocent — Comptroller
Corey McIntyre — Chief Financial Officer

GOVERNMENT AND COMMUNITY RELATIONS TEAM
Jefferson Burnett — Vice President, Government and Community Relations
Whitney Duff — Director of Legislative Affairs
Debra Wilson — Legal Counsel

INFORMATION TECHNOLOGY AND ONLINE SERVICES
Daniel Gage — Database Integrator/IT Project Manager
Martha Galindo — Senior Statistician
Cameron Johnson — Web Director
Michael Lewis — Program Analyst for Online Services
Michelle Lyde — Database Manager
George Mendel — Senior Director of Network Systems and Operations
John Rodrigues — Vice President for Information Technology
Monique Rush — Senior Director of Online Statistics and Applications
Elizabeth Spriggs — Senior IT Project Manager
William Umanzor — Help Desk Technician

LEADERSHIP EDUCATION AND DIVERSITY TEAM
Harold Eugene Batiste III — Vice President, Leadership Education and Diversity
Jay Rapp — Senior Director of Programs and Team Initiatives
Tina Wood — Director of Team Administration and Institute Logistics

MARKETING TEAM
Amy Ahart — Senior Director of Annual Conference
Vivian Dandridge-Charles — Managing Director, Member Services
Karen Lauer — Annual Conference Logistics Coordinator
Michael Rease — Manager of Corporate Relations
Zoe Sherlick — Vice President, Marketing
Ryot Smith — Member Services Associate
Shannon Spader — Director of Marketing

PRESDENT’S OFFICE
Patrick Bassett — President
Paul Miller — Senior Director of Global Initiatives
Ioana Wheeler — Associate Director of Global Initiatives and Board Administrator

STRATEGIC INITIATIVES AND RESEARCH TEAM
Duawwonna Bell — Human Resources Manager
Susan Booth — Senior Director of Strategic Initiatives
Donna Orem — Chief Operating Officer
Amada Torres — Senior Director of Academic Research

NAIS SERVICES DIVISION
Charlie Carr — Program Coordinator and Executive Assistant
Alisa Evans — Regional Director
Mike Flanagan — CEO, NAIS Services Division
Amy Hammond — National Director
Tammy Pearson — Business Analyst
Kristen Power — Regional Director
Charles Terzi — Director, Contact Communications Center
Aaron Wachholz — Regional Director
Abdul Yaro — Regional Director

SCHOOL AND STUDENT SERVICES TEAM
Patricia Hayden — Director of Professional Development
Mark Mitchell — Vice President School and Student Services
Melvin Rhoden — Sales Manager, SSS Products
Marcia Prewitt Spiller  
Head of School  
The Children’s School  
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