<table>
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<td>NAIS STAFF</td>
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<td>14</td>
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<tr>
<td>WHAT IS NAIS?</td>
<td>16</td>
</tr>
</tbody>
</table>
Supporting our schools as they find ways to implement 21st century learning skills through innovation was a major goal. The Annual Conference boosted those efforts with its inspiring speakers and the challenge to all educators to strive for creating more student-centric learning environments.

Here are some highlights of the year:

• As a result of our president, Pat Bassett, announcing his retirement in 2013, we appointed a search committee to look for the next president. The committee is chaired by Jack Creeden, the newly elected board chair, and it is well on the way to completing the task of finding the new president of NAIS. We believe the organization is solidly prepared for this transition, due primarily to the talents and hard work of the efficient staff.

• A governing board has been established for the new services division and it continues to move forward. The School and Student Services by NAIS (SSS) continues to be a viable, integral offering to our schools.

• The board worked with staff to implement changes and reallocations in the NAIS budget that will serve to enhance the organization’s financial future. Moving the headquarters to new, improved office space was supported by the board.

• Last summer, as a result of a collaboration of the board’s Equity and Justice committee and the staff, NAIS held the second annual HEADS Institute — bringing together heads of school to share methods and implementations of diversity work and inclusivity in our schools. Revised principles of good practice in this area have been issued to our schools.

• In the area of public policy and government relations, we continue to monitor debates for accountability, education choices (charter schools, tax credits), and how our schools will be impacted.

• We continue to support the staff in forging and solidifying partnerships that are integral to NAIS’s work.

• We have supported the member relations team as they work to enhance recruitment and retention efforts for the organization’s membership.

We are pleased that NAIS is fiscally sound. It is well positioned for short- and long-term sustainability. It is also solidly positioned for change. As an organization, the future is bright. We are proud of the impact we have on our schools and the meaningful work that impacts and changes the lives of the children in our schools.
MESSAGE FROM THE PRESIDENT

Patrick F. Bassett

As the summaries in this Annual Report 2010-2011 all have indicated — from Marcia Prewitt Spiller, head of The Children’s School (GA) and NAIS board chair, from Lou Salza (head of Lawrence School (OH) and NAIS treasurer, and from Jack Creeden (head of School Year Abroad and NAIS board vice-president) — 2010-2011 was a good year for NAIS, reflecting the following:

- Ongoing strategic initiatives in the five sustainability arenas: demographic (access and diversity); financial; environmental; global; and programmatic (schools of the future).
- Strong financials.
- Growing membership.
- Significant resource commitments to improvements to SSS by NAIS and to StatsOnline.
- Ongoing research and action step analysis in the now annual Trendbook series.
- Highly successful and well-attended conferences (Annual Conference and PoCC/NLDC) and summer institutes.

For our members’ continuing support of NAIS and its efforts, we are grateful.

In the president’s “condition of the industry” Annual Report to the Membership at the Annual Conference in Seattle (March 2, 2012), I shared the most recent updated data from StatsOnline three-year trends (spanning school years 2009-10, 2010-11, and 2011-12), revealing a remarkably quick recovery for most NAIS schools from the initially serious impact of the 2008 recession:

- The admissions funnel narrowed just a bit…and then it stabilized. (“Praise be to God!” as we say in the Episcopal Church)
- Attrition went up…and then it went down.
- Giving went down…and then it went up.

Our annual conference was also the time — to the day — for NAIS to launch the celebration of our 50th year of operations, after being founded on March 1, 1962, by a vote of delegates from the Independent Schools Education Board (ISEB) and the National Council of Independent Schools (NCIS) to establish the National Association of Independent Schools. (On our website, at www.nais.org/go/NAISat50, one can find our brief “History of NAIS” sharing the highlights of these past five decades, and memoir articles by two of my predecessors, John Estes and Peter Relic, and by Tom Read, former president of ISACS.)

My contribution to recognizing NAIS’s 50th are the remarks I made at the Annual Conference on “What It Means To Be 50.”

As the graphic at right illustrates, compared to Fortune 500 companies, it is independent schools that “pass the test of time” and are truly “built to last.”

As the chart notes, half of NAIS’s schools are more than 100 years old.

What it means to be 50

<table>
<thead>
<tr>
<th>Institution Built to Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of NAIS membership schools over 300 years old</td>
</tr>
<tr>
<td>Number of NAIS membership schools over 200 years old</td>
</tr>
<tr>
<td>Number of NAIS membership schools over 100 years old</td>
</tr>
<tr>
<td>Number of NAIS membership schools over 50 years old</td>
</tr>
</tbody>
</table>

Institutions Built to Last

<table>
<thead>
<tr>
<th>Number of Years Old</th>
<th>Number of NAIS Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 or older</td>
<td>7</td>
</tr>
<tr>
<td>2001 to 300</td>
<td>50</td>
</tr>
<tr>
<td>301 to 200</td>
<td>278</td>
</tr>
<tr>
<td>201 to 100</td>
<td>380</td>
</tr>
<tr>
<td>26 to 50</td>
<td>540</td>
</tr>
<tr>
<td>11 to 25</td>
<td>95</td>
</tr>
<tr>
<td>6 to 11</td>
<td>11</td>
</tr>
<tr>
<td>0 to 5</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>1,142</td>
</tr>
</tbody>
</table>

NAIS at 50 logo

SELECTED HIGHLIGHTS FROM OUR 50 YEARS

- 1962 NAIS established in Boston.
- 1963 First NAIS Annual Conference is held in New York City with 3,000 participants representing 660 member schools.
- 1969 NAIS establishes the Office of Minority Affairs.
- 1973 Private schools note the 50th anniversary of the U.S. Supreme Court decision in Meyer v. Nebraska in which a private school’s curricular independence is upheld.
- 1976 NAIS publishes Understanding Faculty Unions and Collective Bargaining.
- 1978 NAIS establishes a full-time office in Washington, D.C.
- 1982 NAIS membership exceeds 900.
- 1987 NAIS publishes Strategic Planning for Independent Schools.
- 1991 NAIS conducts its First national public opinion poll: 87% say private schools are good for the country because they provide choice for parents.
“DON’T MEDDLE…. Do your best to see the organization is good, well-manned, and that it runs smoothly, but don’t try to run it.”

“Page 4: “A wealthy and generous trustee is a very fine thing.”

“Page 25: “Some trustees, frequently officers or committee chairs, may become officious and individually try to dictate to the headmaster or try to tell the head groundskeeper or athletic director what he is to do, and [and] bad feeling and confusion are bound to result…”

For NAIS’s first 50 years, our historical role has always been to manifest its mission “to be the national voice of independent schools and the center for collective action on their behalf” by being the reliable resource for data and trends, for “thought-leadership” and to be the industry’s standard-bearer on best practices in governance and leadership. And, in the last decade of that half-century, we have tried to provide services and leadership by modeling what it means to align Values (our “four I’s of Independence, Interdependence, Innovation, and Inclusivity”), Vision (“Good to Great”), and Goals (advocacy, diversity, sustainability).

NAIS is now ensconced in creating a strategy map for the first part of the “Next 50 Years,” and, in doing so, we will focus on being and becoming a hub of innovation, the think tank for the industry, a model of good governance and best practices, and the “go-to” resource for practical “toolkits” to address landscape challenges facing schools.

We remain as committed as ever to service to the needs of schools.
Soren Kirkergaard once wrote that “life is understood backwards, but must be lived forwards.” After serving as a head for 16 years, and Treasurer here for two, I conclude the same is true for budgets and for our nation’s economy.

While time will offer increasing context on the recent banking crises and upheaval in the markets, continuing economic uncertainties remain a major concern for our schools as we look ahead.

As head of a small school in Northeast Ohio, when I look at changes in admissions and financial aid, I see less of the former and more of the latter! I see a new reality — perhaps even a new normal for most — if not all of us.

English novelist Elizabeth Jane Howard wrote, “Call it a clan, call it a network, call it a family; whatever you call it, whoever you are, you need one.”

Our association, with its networks, data, knowledge, and wisdom will grow in importance as we look back to understand what has happened — and as we look ahead at what will be required to secure the future for our schools.

The Finance Committee of the Board and the NAIS staff have worked closely together 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 independence, accessibility, innovation, inclusivity, equity, and justice

I am pleased to report an operating surplus at the end of fiscal year 2010-11:
• Total operating revenues were $19,742,000.
• Total operating expenses were $18,048,000.
• Total operating revenues exceeded operating expenses by $1,694,000, and our long-term investment fund had a gain of $1.6 M.
• Revenue from member dues remains at 33 percent of budget with a steady increase in the number of new members.

The balance of our annual operating revenues is generated by conferences, workshops, products, and services.

Among accomplishments in 2010-2011, our budget provided for the following programs and services:
• Expansion of tutorial webinars, informational videos, and online tools for school financial sustainability
• Improvement of the Demographic Center and the Survey Builder
• Redesign of our website (roll-out to come later in the year)
• Added features to SSS services
• Cultivation of a relationship with Teach for America to drive teacher recruitment
• Improvements of the StatsOnline system
• Leadership and sustainability workshops
• Schools of the Future
• Challenge 20/20
• Assessment of Inclusivity and Multiculturalism (AIM)
• Global and environmental initiatives
• Trustee services
• NAIS publications, especially the award-winning Independent School magazine, Savvy Trustee, and the NAIS eBulletin, now with a circulation of over 12,000.

William Edwards Deming once said “In God we Trust—all others must bring data.”

Data from the NAIS Trendbook can help your leadership team and your board.

I hope this overview of recent results and accomplishments gives you some insight into the many ways NAIS has worked hard to return value to the membership and to provide leadership nationally and globally.

On behalf of the finance committee, I take this opportunity to congratulate Pat Bassett and his intrepid staff for another excellent year of high quality service to our schools, and inspiring leadership in our industry.

My gratitude to outgoing Board Chair Marcia Previtt Spiller, for her deft guidance and leadership of the powerful pride of lions and lionesses who serve on this board.

I would like to take this opportunity to acknowledge the members of the NAIS Board Finance Committee: Barb Egan, Liz Duffy, Robert Witt, Scott Looney, Dennis Bisguard, Jerry Katz, Skip Kotkins, and Mike Saxianian. I thank committee members for their diligence and financial acumen.

Finally, to all members — thank you for your leadership in independent education every day — for your care and service to our nation’s children.
### Statements of Financial Position

**For the Years Ended June 30, 2011 and 2010**

#### Assets

**Current Assets:**
- Cash and cash equivalents: $10,107,059 / $9,762,781
- Accounts receivable, net: 81,300 / 21,244
- Publications inventory, net of allowance of $104,221 in 2011 and $109,627 in 2010: 231,219 / 220,964
- Prepaids, deposits, and other assets: 280,798 / 278,562

**Total Current Assets:** $10,700,376 / $10,283,551

**Furniture, Equipment, and Software, Net:** $1,260,710 / $1,220,656

**Other Assets:**
- Long-term investments: $7,807,248 / $6,197,816
- Investments related to deferred compensation: 421,076 / 245,184

**Total Other Assets:** $8,228,324 / $6,443,000

**Total Assets:** $20,189,410 / $17,947,207

#### Liabilities and Net Assets

**Current Liabilities:**
- Accounts payable and accrued expenses: $1,370,265 / $1,194,862
- Deferred revenue: 2,227,482 / 3,498,631
- Deferred rent benefits - current portion: 105,666 / 89,501

**Total Current Liabilities:** $3,703,413 / $4,782,994

**Other Liabilities:**
- Long-term investments: $7,807,248 / $6,197,816
- Investments related to deferred compensation: 421,076 / 245,184

**Total Other Liabilities:** $8,228,324 / $6,443,000

**Total Liabilities:** $20,189,410 / $17,947,207

**Net Assets:**
- Undesignated: $8,210,788 / $6,516,658
- Board designated: 7,807,248 / 6,197,816

**Total Net Assets:** $16,018,036 / $12,714,474

**Total Liabilities and Net Assets:** $20,189,410 / $17,947,207

### Statements of Activities

**For the Years Ended June 30, 2011 and 2010**

#### Revenue and Support

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues and subscriptions</td>
<td>$7,230,088</td>
<td>$6,861,719</td>
</tr>
<tr>
<td>Financial aid services</td>
<td>$5,593,620</td>
<td>$5,653,096</td>
</tr>
<tr>
<td>Conferences and workshops</td>
<td>$4,553,397</td>
<td>$3,912,902</td>
</tr>
<tr>
<td>Publications</td>
<td>$586,750</td>
<td>$575,933</td>
</tr>
<tr>
<td>Foundation and corporate support</td>
<td>$1,660,575</td>
<td>$1,479,603</td>
</tr>
<tr>
<td>Operating investment income</td>
<td>$4,340</td>
<td>$12,680</td>
</tr>
<tr>
<td>Other revenues</td>
<td>$113,246</td>
<td>$141,536</td>
</tr>
</tbody>
</table>

**Total Revenue and Support:** $19,742,016 / $18,637,469

#### Expenses

**Program expenses:** $16,705,778 / $16,495,981

**Supporting services:**
- Management and general: $757,752 / $872,337
- Member development: $487,199 / $587,927
- Fundraising: $97,058 / $99,031

**Total Supporting Services:** $1,342,109 / $1,559,295

**Total Expenses:** $18,047,887 / $18,055,276

#### Operating Surplus

$1,694,129 / $582,193

#### Non-Operating Items

**Long-term fund investment return, net:** $1,609,433 / $791,224

**Change in Net Assets:** $3,303,562 / $1,373,417

**Net Assets, Beginning of Year:** 12,714,474 / 11,341,057

**Net Assets, End of Year:** $16,018,036 / $12,714,474
## STATEMENTS OF CASH FLOWS

For the years ended June 30, 2011 and 2010

### CASH FLOWS FROM OPERATING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$3,303,562</td>
<td>$1,373,417</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>651,871</td>
<td>706,096</td>
</tr>
<tr>
<td>Loss on disposal of furniture and equipment</td>
<td>200</td>
<td>10,914</td>
</tr>
<tr>
<td>Unrealized (gain) on investments</td>
<td>(1,372,008)</td>
<td>(602,278)</td>
</tr>
<tr>
<td>Realized gain on investments</td>
<td>–</td>
<td>(24,763)</td>
</tr>
<tr>
<td>Change in provision for bad debts</td>
<td>5,906</td>
<td>(4,788)</td>
</tr>
<tr>
<td>Change in inventory reserve</td>
<td>(5,406)</td>
<td>61,038</td>
</tr>
<tr>
<td>Changes in assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>(65,962)</td>
<td>42,379</td>
</tr>
<tr>
<td>Publications inventory</td>
<td>(4,849)</td>
<td>(57,798)</td>
</tr>
<tr>
<td>Prepaid, deposits, and other assets</td>
<td>(2,236)</td>
<td>372,033</td>
</tr>
<tr>
<td>Investments related to deferred compensation</td>
<td>(175,403)</td>
<td>293,418</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>(1,271,149)</td>
<td>1,804,601</td>
</tr>
<tr>
<td>Deferred compensation</td>
<td>123,892</td>
<td>79,626</td>
</tr>
<tr>
<td>Deferred rent benefits</td>
<td>(89,505)</td>
<td>(73,649)</td>
</tr>
</tbody>
</table>

**NET CASH PROVIDED BY OPERATING ACTIVITIES**

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1,273,827</td>
<td>$3,952,620</td>
</tr>
</tbody>
</table>

### CASH FLOWS FROM INVESTING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases of furniture, equipment, and software</td>
<td>(692,125)</td>
<td>(395,437)</td>
</tr>
<tr>
<td>Sale/maturities of investments</td>
<td>–</td>
<td>1,098,621</td>
</tr>
<tr>
<td>Reinvested income from investments</td>
<td>(237,424)</td>
<td>(164,458)</td>
</tr>
</tbody>
</table>

**NET CASH USED IN PROVIDED BY INVESTING ACTIVITIES**

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(929,549)</td>
<td>538,726</td>
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</tbody>
</table>

**NET INCREASE IN CASH AND CASH EQUIVALENTS**

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$344,278</td>
<td>$4,491,346</td>
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</tbody>
</table>

**CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR**

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9,762,781</td>
<td>5,271,435</td>
</tr>
</tbody>
</table>

**CASH AND CASH EQUIVALENTS, END OF YEAR**

<table>
<thead>
<tr>
<th>Description</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$10,107,059</td>
<td>$9,762,781</td>
</tr>
</tbody>
</table>

## NAIS STAFF

This list reflects staff as of May 2012

### President’s Office

- **Patrick Bassett**, President
- **Paul Miller**, Senior Director, Global Initiatives
- **Laurenne Sayles**, Executive Assistant (temp)
- **Ioana Suciu Wheeler**, Director, Global Initiatives and Board of Trustees Programs

### Communications Team

- **Jen Lesar**, Web Content Strategist
- **Myra McGovern**, Senior Director, Public Information
- **Ari Pinkus**, Associate Editor of Publications
- **Nancy Raley**, Vice President, Communications
- **Kitty Thuermer**, Director, Publications

### Finance & Administration Team

- **Efrem Abate**, Staff Accountant
- **Janyce Bryant**, Director, Administration & Facilities
- **Netty Ford**, Accounts Receivable Manager
- **Francisco Innocent**, Comptroller

### School Field Services & Equity and Justice Initiatives Team

- **Corey McIntyre**, Chief Financial Officer
- **Harold Eugene Batiste III**, Vice President, School Field Services & Equity and Justice Initiatives
- **Tina Wood**, Director, Team Administration

### Government & Community Relations Team

- **Jefferson Burnett**, Vice President, Government & Community Relations
- **Whitney Duff**, Director, Legislative Affairs

### Information Technology Team

- **Debra Wilson**, Legal Counsel
  - **Daniel Gage**, Database Integrator/IT Project Manager
  - **Cameron Johnson**, Web Director
  - **Michelle Lyde**, Database Manager
  - **George Mendel**, Senior Director, Network Systems & Operations
  - **John Rodrigues**, Vice President, Information Technology
  - **Beth Spriggs**, Senior Director, IT Project Management
  - **William Umanzor**, Help Desk/Technical Support Specialist

### Marketing and Membership Team

- **Vivian Dandridge Charles**, Managing Director, Membership Services
- **Amelia Kurz**, Marketing Production Coordinator
- **Zoe Sheriff**, Vice President, Marketing
- **Floyd Smith**, Member Services Associate
- **Shannon Spaedder**, Director, Marketing
- **Megan Steehler**, Member Services Associate

### Research Team

- **Strategic Initiatives & Research Team**
  - **Ioana Suciu Wheeler**, Senior Director of Programs
  - **Jay Rapp**, Senior Director, Strategic Initiatives
  - **Donna Orem**, Chief Operating Officer
  - **Amada Torres**, Senior Director, Academic Research

### NAIS Services Division

- **Carlos Rapp**, Program Lead, Educational Access
- **Alisa Evans**, Regional Director
- **Mike Flanagan**, Chief Executive Officer
- **Amy Hammond**, National Director
- **Patricia Hayden**, Director, Professional Development
- **Mark Mitchell**, Vice President, School & Student Services
- **Daniel Mollen**, Director, Professional Development
- **Mike Flanagan**, Business Analyst
- **Kristen Power**, Regional Director
- **Melvin Rhoden**, Manager, School Support
- **Charles Terzi**, Director, Contact Communications Center
- **Aaron Wachholz**, Regional Director
- **Abdul Yaro**, Regional Director

### Legal Counsel

- **Debra Wilson**, Legal Counsel

### NAIS Annual Conference Production

- **Bridget Janicki**, NAIS Annual Conference Production Manager
- **Karen Layser**, Annual Conference Logistics Coordinator
- **Elizabeth Pringle**, Vice President, Professional Development

### Regional Director

- **Abdul Yaro**, Regional Director

### NAIS Annual Conference 2010-2011

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- **Elizabeth Pringle**, Vice President, Professional Development

### Regional Director

- **Abdul Yaro**, Regional Director
NAIS BOARD OF TRUSTEES

This list reflects trustees as of May 2012

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President
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