

History of NAIS from the Nineties to the New Millennium

By Peter D. Relic, President, NAIS, 1991-2001

When Pat Bassett asked me to write a history of NAIS from 1991 to 2001 while I was president, I started to ask independent school educators what they recalled as most important from that era. While my conversations with more than 300 experienced and new school administrators and teachers were in no way scientific, the results were similar to formal surveys conducted a few years ago.

By far, the most frequently cited accomplishment was the relocation in 1993 to Washington, D.C. and the conclusive emergence of NAIS as the national voice of independent education. There were other significant themes: expanding publications; the Annual and People of Color Conferences and the depth of topics and range of prominent speakers and presenters; the professional development opportunities, especially New Heads and Leadership through Partnership and Governance Through Partnership; and the battle against *U.S. News and World Report* ranking of schools.

Not surprisingly, experienced school heads were highly subjective, emphasizing the relationship of their schools to NAIS. One head said, "NAIS answered even my late afternoon calls for help." Another administrator emphasized that "the wounds finally healed between NAIS and the regional associations, and NAIS became a presence in my part of the country." A long-time head said, "You visited my school as the new president and visited every classroom, met with teachers and trustees and parents, and started a steady stream of NAIS staff as resources to the school and state and region."

There was an amusing aspect to these conversations. At one symposium of both veteran and new independent school teachers, I asked the question about NAIS contributions from 1991 to 2001. Most young teachers in the audience were surprised at what they heard. "You mean NAIS hasn't always been in Washington?" "You were once president of NAIS?"

Where to begin this recollection and recapitulation? First, I suggest you read John Esty's superbly detailed essay on NAIS from 1978 to 1991; it is available online at www.nais.org. The foundation for what we accomplished in my time was built in John's time, just as he built upon the work of his predecessor, Cary Potter.

Two of the first calls I made as president were to John and Cary. I told them that I wanted their continuing advice, reacting to what NAIS was doing and taking the initiative on any topic, at any time. No shrinking violets they; their counsel was always a blessing for me and for NAIS.

Second, I hope you will recall the names of the chairs of the NAIS board in that era. As in any independent school, the strong, sometimes heroic, leadership of the board was

crucial to success. They spoke out; they encouraged other to speak; they insisted that each trustee keep in touch with the people whom they represented; they stood tall when times were most difficult; they were models of independent school leadership: John Ratté, Karan Merry, Dick Drew, Paul Pressly. Was there a single time in those 10 years when they were not available for consultation? When they failed to do their homework and to prepare for meetings and conferences and confrontations? When they refused to take the lead? No, there was not a single instance. (But I do recall that Dick was somewhat reluctant to become chair; Karan convinced him to succeed her as board chair at a Red Sox game at Fenway Park.)

And third, for organizational purposes, I will use both a thematic approach to this essay and the annual reports as a guide to this journey through the years. Undoubtedly, there are people and topics omitted that will disappoint some of you; I apologize for any omissions – it sure is difficult to include everything. But let's try...

THE BEGINNING

At the beginning, when the NAIS board of directors offered me the presidency, the chair, John Ratté, asked me how long all that we discussed might take to accomplish. "Ten years," I responded, and John, always quick and on the mark, asked if I would accept a 10- year contract.

After the laughter from the rest of the board, we became almost too serious. Aware that my selection was controversial – I had been a public school administrator and superintendent for the previous 18 years, however much my career was rooted in independent schools – I asked the board to express unanimity in my selection. In effect, each board member had veto power, I said. We needed to be together for the sake of the association; on this point, the entire board needed to support the selection and speak with one voice. Fortunately, and happily for me, the directors agreed and I accepted their invitation.

While I began my duties officially on July 1, 1991, there were many opportunities in the preceding four months that immediately provided insight into NAIS's strength and potential – and problems. I attended the Annual Conference and New Heads and accepted invitations to speak at the Pennsylvania Association of Independent Schools (PAIS) and the Association of Delaware Valley Independent Schools (ADVIS). Everywhere, independent school people were emphatic about their appreciation for NAIS's work, but just as clearly they expressed their concerns: NAIS needed to be more responsive and to be a greater presence. And the anticipation about relocating to Washington added a dimension to our conversations that was surpassed only by the move itself. Most school administrators and trustees favored the move; some did not. Why not? The reluctance to change; the cost; concerns that older, traditional schools, especially in New England, would be abandoned; the idea that NAIS would be swallowed up by the Washington bureaucracy. But most people said, "Finally, we will be in the nation's capital. NAIS will represent all the schools and will be a symbol of independent schools, known nationally."

Some problems that we confronted were obvious: NAIS needed a totally new communications system and a thorough updating of technology, and, in some ways, a shift in attitude. “We will be available for calls in the late afternoon; we will be responsive,” became our mantra. A couple of initial hires began the successful effort to address the problem, and certainly by the time the relocation was completed, responsiveness became a highly ranked item on school service surveys.

Many of the complaints came from schools on the West Coast, Hawaii, and international schools, and the issue was not just responsiveness; it was also representation. The board responded with understanding, and within two years, the NAIS board had added two members, to a total of 26. Representation from the West increased with the new seats. It is interesting to note that size again became an issue in strategic planning sessions in 2000, eventually resulting in the reduction of seats on the board to the current 22.

There was one other concern that initially was baffling to me, one that took years to ameliorate. For some reasons, personal as well as organizational, the tension between NAIS and many of the member associations was palpable. At our first association executives meeting, I asked some execs who were long-time friends, “What have I done wrong already?”

The responses indicated that in the previous few years some harsh things had been said. By omission and commission, a kind of estrangement had developed. Rather than fundamental organizational issues, I would describe the attitude as awkwardness, coolness, tentativeness. The advice to me from association heads was clear: “Be open, be constructive, let’s work together – and be in the regions and schools to see up close our strengths and successes and needs. Work really hard, you and your staff, on the partnership between NAIS and member associations.”

As to what we needed to do, at NAIS and in independent education, with the hundreds of suggestions offered, I think John Esty’s final report to the membership did as much as anything to set the agenda and tone for the last decade of the 20th century. John had challenged us:

- To educate children for a smaller and smaller world, including a thorough curriculum review.
- To integrate new knowledge from research about how the brain functions and how learning occurs.
- To become thoroughly knowledgeable about the environment before the earth is no longer viable for human beings (even though the truths might be inconvenient).
- To integrate new knowledge about the computer with creative and humane concerns.

- To recognize that this society continues to honor teachers to a limited extent but too often with misunderstanding and even disdain.
- To meet head-on public misconceptions and criticisms of independent education.
- To become more aware of demographic and economic factors and the decline of our traditional sources of students.
- To preserve our independence.
- To create an ever stronger ethical context for teaching and learning in our schools.

As if John's challenges were not sufficiently demanding, the membership clearly called for greater efforts in several areas:

- To embark on a concerted effort to inform the public about choice in education and to create marketing initiatives.
- To identify the most efficacious ways to improve public relations.
- . To mount a renewed effort on access and affordability.
- . To emphasize the themes of equity and justice and to explore the multiple definitions of diversity.
- . To broaden the scope and utility of NAIS statistics.
- . To expand NAIS legal services in partnership with the state and regional associations.
- . To explore ways to improve and strengthen accreditation.

...and on and on....

THE TRANSITION

The NAIS board in 1992 was a living example of diversity in independent education; of the 24 directors, there were six people of color, and there were 10 women and 14 men. The board enthusiastically supported both the expansion of the staff, commensurate with the expanding agenda, and the commitment to bring true diversity to the staff; by the mid-90s, firmly relocated in Washington, the staff was 40 percent people of color. As a staff, we made a policy decision: in every personnel search, there would be at least one person of color. Word got around Washington, and did we ever attract top candidates.

The board also took a strong stand on parental choice to ringing endorsements by the schools and associations. A unanimous board vote affirmed the intrinsic belief that

independent schools must be committed to the freedom of parental choice. The board made a strong statement about equity and access, the opportunity for all families to have choices with increasing information provided to the public and more resources for student financial assistance. To underscore this commitment, the staff crafted the Principles of Good Practice for Financial Aid Administration and generated reactions in regional meetings from the membership.

As with every theme or topic, leadership was the key; people made the difference. On financial aid issues, Meade Thayer, director of financial aid services, was the point person, working with determination and sensitivity with his committee, the board, and member schools and associations. And as on all Principles of Good Practice, the communication and wordsmith skills of Steve Clem, vice president for academic services, always carried the day.

Setting the tone for many endeavors in the next decade, we emphasized to schools that while the NAIS board spoke for independent education, as in the matter of school choice and, eventually, with telecommunications discounts via E-rate, it was always the individual school's responsibility whether or not to participate, especially where any level of government was involved. Schools should participate with their associations in designing appropriate local, state, and regional plans, too, as well as determining what to do based on the school's mission and philosophy. To participate with a government program could be advantageous; it could also open the door to intrusions on the school's independence.

By the end of 1992, we had our plans for the relocation to Washington – the plan and the budget. We estimated that all costs for closing the Boston office, creating a new office, the move, the lease, support for individual staff – would be \$1.3 million, and that figure proved to be accurate. The budget called for half the amount to be paid out of reserves, the other half from a modest \$300 assessment to each member school for two years. There was no great furor over the assessment. While a few schools complained in the first year, the amount surprised most people, and by the second year of assessment, it seemed that no one noticed (other than ever vigilant business officers).

The precursor to the relocation was the consolidation of NAIS's two small offices in Washington into one office. Government affairs and communication and public information joined at one location, at the intersection of 18th and M Streets and Connecticut Avenue. There were four people absolutely crucial to the transition: executive vice president Barbara Stock; Phil McPherson, director of programs, administration, and finance; Margaret Goldsborough, director of public information; and Jack Sanders, vice president for government relations. Jack introduced me to everyone in Washington. Margaret and I began a partnership that resulted in scores of interviews, hundreds of speeches, and thousands of words in print; and of Barbara and Phil...more later.

As I traveled the country in the first year, I was especially interested to hear what people said I should write. Three topics came up repeatedly, and they became themes for early

articles in both *Independent School* magazine and the *NAIS Executive Summary* (created by Margaret) – on values, public policy development, and multicultural education. It is important to note that these topics remained stage center not only in my tenure, but also since Pat Bassett assumed the NAIS presidency.

Even in the first year, there was lively debate about the future of two NAIS activities: boarding schools and business services. Little did we know – or did we? – that someday what Rick Cowan, followed by Rick Shubart and then Steve Ruzicka, accomplished would eventually become The Association of Boarding Schools (TABS), and what Jim Kaull did in business services would become independent of NAIS as the National Business Officers Association (NBOA). And of that, more later, too....

THE RELOCATION

We did it. We closed the Boston office and relocated on August 1, 1993 to 1620 L Street, within walking distance of the White House and colleague education associations and a short Metro ride to Capitol Hill. As new board chair Karan Merry, the first person of color to chair the NAIS board, said, “We met the board’s criteria to be close to sister associations, the Congress, and the Administration, and to provide a place convenient for our staff and the people from member schools.” Everyone on the staff pitched in, but two people were key – Barbara Stock and Phil McPherson led the way.

I lost count of the trips Barbara and Phil made between Boston and Washington. They worked tirelessly on finding the best half dozen possible locations, then they created the process with staff and the board to make the decision, not only on the office location, but on architectural and interior design. (Of course, when we think about the interior, how could we miss having an attractive office with input from such folks as Selby Holmberg McPhee, Catherine O’Neill Grace, and Heather Hoerle.) The work was tense and exhausting. To Barbara and Phil’s credit, the membership never sensed the magnitude of the issues; with those two stalwarts, it was always “can do.” Remarkably, NAIS is still in the same location, 13 years later. The initial lease and then the second lease were negotiated. Somehow, NAIS attracts the best people (my bias will show throughout this summary) to get the job done well: even when Barbara and Phil left NAIS years later, their successors, Ann Hicks and then Jeff Moredock, as executive vice president, and Thoai Hovanky as chief financial officer, continued the office space as a top priority, from the advantageous lease to redesign and refurbishing.

The first year in the nation’s capital provided the staff, board, and membership many opportunities to celebrate. Board and committee meetings were held both at the NAIS office and at convenient area schools and locations. People from member schools were always welcome; visits were often for business purposes, just as often out of curiosity. Most people expressed joy at the beauty and functioning of the office. I recall one school head, originally a detractor of the relocation, who visited and upon leaving said, “Not half bad.”

The impact of the relocation was immediate on government relations. NAIS plunged into an ambitious agenda under the new leadership of Jefferson Burnett, vice president of government relations, the first of many to join NAIS from the Council for Advancement of Education (CASE). Jefferson had several traits and skills that made him successful from the outset: the tenacity to sift through thousands of words in documents to understand the essence of each issue; the willingness to work the night as well as day shift – his 16 hour days became legendary; the sensitivity to understand that in addition to meeting with education leaders in formal meetings he also had to prowl the halls of Congress to gain access where previously access might not have existed.

The relocation and the government agenda went hand in hand. NAIS became an instant player in laws and regulations with impact on private schools – on environmental issues, the Family Leave Act, the Americans With Disabilities Act, and the elementary and secondary reauthorizations. As other initiatives came to the fore, such as eventually Goals 2000, NAIS began to play a fascinating and unusual role. As heated discussions began on telecommunications issues, many national education association execs determined that NAIS was the perfect place to meet. In part because of Jefferson's personality and leadership skills, even adversaries were willing to meet at NAIS, a sort of neutral ground for public officials, to hammer out the details of compromise.

Relocation inevitably means reorganization. Critical for NAIS were internal and external collaboration and the quality of services to schools. The centerpiece to the new structure was the creation of a school leadership team under the direction of Linda Gibbs and Steve Clem and the culmination of initial planning from John Esty's time in the "Promoting Independent Education" initiative, led by Selby Holmberg McPhee and later in expanded member relations services led by Heather Hoerle.

The relocation also eventually encouraged us to consider a new logo, a process that in substance and style depicted NAIS, its mission and services, in a dynamic national and international leadership role. The modern logo was part of a more extensive corporate identity project to increase the profile of NAIS with the membership and the general public.

PIVOTAL YEARS, 1993-96

With the relocation and reorganization accomplished, what would NAIS services look like? What was the proof that NAIS was both leading and responsive to the requests, questions, and demands of the membership? With so much of the "old guard" leadership on the board, staff, and schools moving on, would the transition to new leadership be smooth, as well as dynamic? Some of the answers from that time included the following:

- .NAIS responded to the board's call to be "national" by taking conferences to San Diego, Chicago, Minneapolis, Orlando, St. Louis, Dallas, Atlanta, and Charleston, South Carolina, as well as frequent returns to New York City and Boston.. And then the call to be "international" was met initially by Jim Kaull with the first business officers services meeting outside the U.S. – at Upper Canada College in Toronto.

- The challenge for NAIS to lead in instructional and administrative applications of the computer and other educational technologies resulted in a range of activities, from a pilot communications project with Fred Calder and Barbara Swanson and the member schools of the New York Association of Independent Schools to the Annual Conference in Orlando with the theme of technology in education.
- Partnerships with foundations and universities were strengthened - with the Klingenstein Foundation and the DeWitt, Wallace Foundation, the Dodge Foundation, with the E.E. Ford Foundation, with Teachers College of Columbia University, and the education and business schools of Harvard University. There was nothing automatic or *pro forma* about these relations, just good hard work, constant communication, and grant writing that bought institutional support – Linda Gibbs, Steve Clem, Randolph Carter, Dory Adams, Jim Kaull, Jefferson Burnett were the staff who made it happen.
- From the issues of diversity, gender equity, and career paths to the Leadership and Governance Partnerships, NAIS had the right people in the right places. The Moral Life of Schools project breathed new life into independent schools; the Leadership through Partnership conferences grew phenomenally (at a time when the head-chair partnership became ever more crucial to stem the tide of disruptive departures of heads from independent schools); business and development services joined forces to provide more targeted services, especially to small schools and schools with limited resources. And other alliances focused on curricular and teaching issues, such as with the Wellesley College Center for Research on Women with Peggy McIntosh, and with Meg Moulton and the National Coalition of Girls' Schools.
- Steve and Linda brought new dimensions to NAIS statistics under the leadership of Martha Galindo – more and better statistics, easier to use, published earlier. The trend has continued.
- We received constant follow up phone calls and e-mails from participants of Dory Adams' Educating the Heart workshops: "I'm resurrected." "I've been reminded why I'm a teacher." "I won't doubt my calling again." "There's hope...."
- Publications: From the first articles I wrote for NAIS in the 1960s, published in what *Independent School* magazine was originally named, *The Bulletin*, I have been educated, entertained, and enamored of NAIS in print. Then in my 10 years as president, to work with Catherine O'Neill Grace, Michael Brosnan, Margaret Goldsborough, and Nancy Raley – what a journey it was. Peter Aitkin's book on *Access and Affordability*; Helen Colson's *Philanthropy at Independent Schools*; Vance Wilson's and Steve Clem's *Paths to New Curriculum; Shaping Strategy: Independent School Planning* in the '90s; *Principles of Good Practice* for the Hiring Process, for Middle Schools, for Parents, for Early Childhood Educators, for Equity and Justice in Schools – hugely anticipated, widely used, of immense impact – and they in turn were followed by edition after edition of *The Trustee Handbook*, most

recently by Mary DeKuyper. The books and principles stand as testimony to the ability and insight of their authors and to the services NAIS provides to the membership. Somehow, Margaret Goldsborough had the connections and moxie to get my articles on the wire services, and every year they appeared in more than 30 newspapers, from *The New York Times* to the *Missoulian* in Montana.

Some activities were extensions of long standing endeavors, such as the glorious inclusion of students in the People of Color Conference and Barbara Stock's Recognition Program that validated accreditation and evaluation procedures. Barbara pioneered the program with international schools, the first with Michael Maybury and the European Council of Independent Schools. Other initiatives set the stage for success later in the '90s, like Meade Thayer's collaboration with the Educational Testing Service to analyze and expand middle income family eligibility for financial aid and Heather Hoerle's creative work in combining marketing and admission services with new advertising templates for use by member schools and associations. One school head reported, "I could use NAIS' templates for marketing my school as a benefit of my NAIS membership or I could pay an advertising firm \$20,000; the choice was easy."

There were bold partnerships, new in concept and far-reaching in impact. One most fondly recalled was the collaboration with Robert Witt's Hawaii Association of Independent Schools in creating the Pacific Basin Conference and related Pacific Rim activities.

The growth of NAIS school membership to 1,033 by 1996, the first time in the association's history that membership topped 1,000, was important symbolically of course, but growth put us in a secure financial position. New membership, the continued huge growth of School and Student Services for Financial Aid (led by Meade Thayer and his successor, Mark Mitchell), and extremely wise investments (the board's finance and investment committee and Phil McPherson, and later Thoai Hovanky, formed an awesome partnership) permitted NAIS to rebuild the reserve after the relocation to the level that auditors recommended for financial health, to 36 per cent of the operating budget.

NAIS's growth, presence in Washington, and the impact on all branches of the federal government added up to an enhanced reputation. Just as Jefferson Burnett made NAIS a major player on legislative initiatives, we knew that access to the White House and to the Department of Education was vital. (I was in the Carter Administration at the time of the creation of the Department, but the cast of players had certainly changed by the time NAIS relocated to Washington.) The arrival of Kathleen Johnson as vice president for institutional leadership was a sign that NAIS valued the contributions of long-time independent school heads who also knew their way around Washington. Kiki opened doors that previously had not only been closed; they had been locked. As Secretary of Education Lamar Alexander once said to me, "How is it that memos from NAIS are always on the top of the pile on my desk every morning?"

Recognition of NAIS's place in the pantheon of American elementary and secondary education is illustrated by responses to something I said in 1996 about the role of independent school heads as the leaders of educational reform and improvement in their communities. "Heads of independent schools are the logical candidates to lead. The college presidents are too busy talking about football and raising money. The public school superintendents and principals are beleaguered. Our school heads can be model learners and leaders, the catalysts, the facilitators who bring people together from across the educational spectrum to focus on real improvements in opportunity for all our country's children."

Some reactions were, "Who the hell do you think you are?" "You guys in the rich schools don't really understand or care about the public." But others said, "You know, what you say is true. You're right." "NAIS is already leading with the influence of your Principles of Good Practice on America's public and private schools; you might as well take the reins of leadership, too." And with that my colleague association heads – leaders of more than 25 national education organizations – said that NAIS had the independence, among other qualities, to lead. I was honored to accept the presidency of the Education Leaders Consortium representing all the prominent, influential national associations. Again, it was that move to the nation's capital that set the stage....

THE BATTLE FOR INDEPENDENCE

Where to begin on the struggle with *U.S. News and World Report* about ranking schools? If the magazine ever tells their version of the effort to rank and rate public, parochial, and independent schools, I'm certain it will have no similarity to what NAIS has said. To create another cash cow similar to the lucrative ranking of colleges and universities *U.S. News* approached NAIS in 1996 to gain our cooperation. Polite conversation led quickly to threats and intimidation, and the magazine threw its determined efforts at NAIS, the National Catholic Educational Association, and the National Association of Secondary School Principals. We association execs and the vast majority of independent school leaders held firm against the magazine. Included here is our statement on ranking schools from the March 1997 Executive Summary, because it says volumes about independence and choice, about the importance of each school and the dignity of the individual child. We said:

With this, as with all questions related to elementary and secondary education, we must keep our focus on children's best interests. NAIS is and always has been opposed to ranking of schools. The "best" school – public, parochial, or independent – is the one that uniquely meets the needs of each particular child.

In the independent school sector, each institution, in its mission statement, defines its own objectives: the kind of program and campus culture the school provides, and often, the qualities that will help a student to succeed there. The schools were not created from one mold. They have different missions, offer different grade ranges, curricular emphases, pedagogical

approaches, and extracurricular programs. Some schools are highly competitive by design, others intentionally create a nurturing atmosphere in which certain students will thrive; some focus on the arts, some on mathematics and science, others on outdoor education. Different schools offer programs for different types of students – bright students with learning differences, the gifted, students of average ability, children who face particular challenges.

Independent schools are to be judged, through their rigorous accreditation processes, according to what they individually set out to accomplish. Ranking such wonderfully different schools against one another misrepresents the institutions, misleads consumer-minded parents about the factors that should be considered in the complex process of choosing a school, but most importantly, can hurt children. Ranking elementary and secondary schools is a de facto labeling of vulnerable children and adolescents and is inherently wrong.

Ranking of schools encourages a destructive competitiveness, leading institutions away from offering rich alternatives and toward a stultifying sameness. It is a disservice to the schools, concerned parents, and children, and therefore, to society.

U.S. News countered by stating that independent schools were afraid of accountability. We responded emphatically that our schools were among the most accountable schools in America because the schools answer directly to their constituencies, to the families who choose them and to the accrediting agencies that evaluate them, and to their alumni who are the stewards of the schools' traditions. If we weren't accountable, we would neither exist nor survive.

U.S. News failed in the effort to rank and rate independent schools. One year there was a major article on boarding schools, the prelude to full ranking of day schools, but the initiative failed. Today many local publications continue to try to compare schools in what most independent school leaders consider a disservice to parents and the public. The NAIS statement on rankings still holds.

That wasn't the only threat to the independence of the schools. By 1996, state intrusion had grown significantly. Many states were trying to mandate proficiency tests of all schools, tests that intruded into independent schools, invaded the curriculum, and consumed time and money for the purpose of teaching down to ill-conceived, often insipid, tests. One state mandated a potato famine curriculum. Others wanted a single state-imposed diploma to replace all other diplomas. Still others limited the number of students on financial aid who were eligible to participate in interscholastic athletics.

There were public school teacher union efforts to control all certification and accreditation.

Numerous state and local jurisdictions wanted to take away the property tax exemption from private schools, churches, and museums; the battle was joined, especially in New England and Pennsylvania.

At the federal level, there were cases all the way to the U.S. Supreme Court to eliminate the property tax exemption status of summer camps and, by extension, of boarding schools.

In every new legislative discussion, there were forces at work to impose unfunded mandates on private schools, to declare students in private schools ineligible for aid to disadvantaged children, and to make private schools ineligible for aid for telecommunications access.

Then there was the National Collegiate Athletic Association, never too busy in its scramble for millions of dollars in television advertising, to try to dictate which secondary school courses were acceptable as credits to establish athletic eligibility; in one instance, the NCAA tried to refuse credit to one independent school's senior honors research seminar, open only to the highest achieving students. Despite volumes of documentation, the NCAA had "never heard of such a course."

Why mention these threats? Because in any recapitulation of any era, we have to remember history and apply it to the present. These threats are with us today, and they probably always will be. The answers for those past threats are still today's answers: eternal vigilance, unceasing hard work, and making every effort at collaboration among NAIS and its local, state, and regional member associations, and with colleague associations throughout the nation that are similarly threatened. Analyze, plan, act. Develop and utilize the political muscle to protect and preserve our independence. That's what the NAIS board and staff through government relations did in those perilous days, successful battles against threats to limit or destroy our independence, and that's the lesson for today and the future.

PEOPLE MAKING THE DIFFERENCE

Let's pause in this march through the years to reinforce an essential theme of this entire essay: it's all about people, their values and commitment and skills. Of course education is all about teaching and learning, and that means people, the teachers and children. No less so with NAIS and its history and services. I apologize for all the names I'm going to omit, but I hope you will at least agree about the importance of those included. There are some people so remarkably important that they deserve special brief mention for their impact on those 10 years.

Was there one person outside NAIS who made everything connect in the first few years in Washington? One person who immediately elevated NAIS in the eyes of all the rest of the private school world? Who sat beside us the entire time we met with leaders of public elementary, secondary, and higher education and the officials of the federal

government? Who worked the political scene with us, with social ease when we needed to be gracious, and banging on doors when independent schools were unfairly excluded? Thank you, Joyce McCray – friend, mentor, teacher, administrator – and the vital collaborator while she was executive director of the Council for American Private Education. All that, and our Pearl Mesta, too....

Was there one essential partner and driving force with NAIS in giving business officers their wings by creating the National Business Officers Association? Yes, the same person I turn to for help on the financial plan or to look 10 years down the road to figure out the implications and consequences of new legislation. So thanks, too, to Will Hancock, there on your hacienda on The Big Island of Hawaii but available to everyone in the independent school world.

Speaking of the world, is there one person who is, more than any other, the face of American independent schools around the globe? Of course it is Michael Thompson. Before Oprah (but after his incredible publications with Ned Hallowell on boys' education), there were defining moments at NAIS Annual Conferences that introduced Michael to the world of international independent schools. It was at NAIS that Michael met David Chojnacki of the Near East South Asia Council of Overseas Schools and Dick Krajczar of the East Asia Regional Council of Overseas Schools. The rest is history. With Michael, it isn't just the books and TV appearances and riveting speeches; it is the way he has done it all – all that expertise, and always kind and gentle and understanding. In this embattled, embittered world, I have to believe that Michael's approach to people just might be the best hope we have for peace and justice.

David Mallery held a unique position at NAIS as director of professional development. But unlike all other members of the staff, he was completely on his own. Staying in touch, attending one staff meeting a year, but omnipresent with his skills and personality. Is there anyone who remembers your name and all about you, even if you haven't seen him for 10 years? Is there one person who stayed in touch? Is there one person who is still a great teacher after more than a half century in teaching? To know David Mallery is to love him.

And for me, is there one person who stands out among all the great educators and artists and commentators and politicians who have spoken at the NAIS Annual Conference? Yes, with all deference to the accumulated brilliance of so many good people, Maya Angelou was the most unforgettable and inspirational. I sat next to her in the front row. Her aide, a young man I knew from North Carolina, whispered to me, "Please be ready to have a pinch hitter; I don't think she can make it." Then Maya turned to me, "Peter, I hate to do this to all these wonderful people, but I'm in such pain that I can't make it up those steps. I'm sorry..." A moment later there was deafening applause as she was introduced. With that, she struggled up. Her assistant and I held her hands. Then she slowly walked to the steps and, I swear, she didn't walk but glided up the stairs. She smiled that radiant smile, and she began to sing, and by the time she reached the podium she was in full voice. For an hour she soared and soared, and we soared with her, and we still do today as we try to help our children to soar.

CLOSING THE DECADE

Looking back at 1997-98, I wonder if we became a bit dizzy at all the growth and changes and challenges. We undoubtedly maintained our balance on the staff and board by supporting each other and, with strategic thinking, careful planning, and annual goals, we tried to take one day at a time. Some of the highlights include the following:

- Conference attendance was huge, sometimes almost too large to handle. In many areas, attendance was the largest in NAIS's history. More than 4,500 at the Annual Conference in New York, the most in 10 years; in 1997, 170 participants from 85 schools at Leadership through Partnership in Baltimore, then surpassed in 1998 by more than 200 heads and chairs at LTP in Chicago; the People of Color Conference in St. Louis in 1997, topping 1,000 participants for the first time, then the 1998 triumph of holding the POCC in San Juan, Puerto Rico; the 1998 CASE/NAIS conference in Boston for the first time exceeding 1,000 development officers, heads, and trustees; in 1998 eight financial aid workshops, 19 onsite Governance through Partnership workshops, seven workshops on the intricate federal Telecommunications E-Rate discounts. Again, it was the people willing to lead and take chances; Linda Gibbs as we said from now on the Annual Conference would be a lollapalooza; Claire Whalen, then Claudia Gallant, bringing tremendous professional expertise to conference planning and organization; Randolph Carter, then Gene Batiste, who took on the challenge of making diversity, equity, and justice live in every aspect of NAIS' mission and services; the partnership with Richard Bradley in services to heads and trustees; Jeff Moredock as executive vice president who even today specializes in board of trustee issues for NAIS.
- The creation of the NAIS Legal Assistance Advisory Panel signaled the importance of NAIS weighing in on court cases vital to the independence of the schools. The Public Affairs Leadership Network, a creation of Jefferson Burnett, grew to over 1,700 heads, trustees, and business officers by 1998; I remember that first year, 1992, with 250 members – and then Jefferson convinced people of the necessity of communications and the political clout NAIS would have with the Administration and Congress when we spoke with one voice.
- A thorough review of all Principles of Good Practice resulted in updating two of them, for full boards and for individual trustees (the most frequently requested principles at the time by non-member schools and associations as well as by members). A new set of principles was created, on athletics, the most controversial ever undertaken by NAIS. In surveying the membership about the necessity and desirability of a PGP in athletics, we heard: "Don't you dare touch athletics; NAIS has no right to be involved in that area." "If you do, it will be the death knell of the association." "There will be nothing more important and helpful to the schools than for NAIS to try to help clean up the mess."

- Other outstanding publications became national and international best sellers; several of the authors were in great demand around the world at conferences of international schools; Jo Ann Deak's *How Girls Thrive*; *Taking Measure: Perspectives on Curriculum and Change* by Steve Clem, Karin O'Neil, and Vance Wilson; a new edition of *Business Management for Independent Schools*; a new *Financial Aid Manual*; a reprint of Michael Thompson's and Ned Hallowell's *Finding the Heart of the Child*; and the two-volume approach to NAIS Statistics. The resource packet *Understanding Sexual Orientation* was received to thunderous applause – and limited but loud criticism – as schools deluged NAIS with requests for the packet and assistance, always met with confident determination by Dory Adams. Certainly, we were praised, but vilified, too – one school head called me, saying that the packet “was the work of the devil.” He said that in his total school community of students, teachers, and parents – more than 1700 people – there was not a single homosexual, and there never would be. A year later, he called and asked for help as the issue exploded at his school.
- NAIS delved more deeply into service learning research, supported by the Surdna Foundation, and into new communications technologies, supported by Bell Atlantic.
- The Telecommunications E-Rate discount legislation once again underscored Jefferson Burnett's highly productive work for independent schools on Capitol Hill, partnering with other private and public school associations. Initially, there was no thought in Congress to make private schools eligible for telecommunications discounts. Jefferson and Chris Collins worked tirelessly to create an equitable approach to funding eligibility. At the same time, we constantly explained to the membership that while it was NAIS's responsibility to assure that private schools were not unfairly excluded, it was the individual school's board of trustees that had to decide to seek funding under federal law. (It's not really federal money dispensed under the Telecommunications Act; just look at your phone bill.) Many NAIS schools applied and received an infusion of funds (more than \$2 million a year), but many did not apply, stating that independence was better preserved when not subject to federal regulations. It is NAIS's responsibility to have a vibrant dialogue with member schools and associations on preserving independence, and it is always each school's responsibility to be true to its own mission.
- 1998 was also a time of turnover in the NAIS staff. Long time devoted staff left: Phil McPherson; Steve Clem to become executive director of the Association of Independent Schools of New England; Meade Thayer to become executive director of the Pacific Northwest Association of Independent Schools. NAIS did not miss a beat with the new leaders: Thoai Hovanky as chief finance officer; Donna Orem as vice president in what is now called strategic initiatives; Mark Mitchell as vice president for financial aid services.

May I indulge myself in two areas (as I guess I have with this entire essay)? First, in publications. How was it possible – how is it possible – for NAIS to accomplish and contribute so much to the literature? I wrote constantly, for every issue of *Independent*

School and for publication in newspapers and education journals throughout the world. In every instance, the team in NAIS's communications office wrote and researched and debated what to do, how, and why. Their partnership with me was invigorating and challenging, and I never left a meeting with them – never – without being amazed at their skills and sensitivity: Nancy Raley who succeeded Margaret Goldsborough as vice president of communications, and who created *NAIS.Ink* and its digital successor, the *NAIS eBulletin*; Kitty Thuermer, director of publications, who knows more about the cultures of the world than anyone I know; Myra McGovern, director of public information, who took delight in figuring out how to get us published in *The Christian Science Monitor* and *The Cleveland Plain Dealer* on the same day; and the secret genius of NAIS communications, Edward Hoyt, editor of publications. Add those stalwarts to the editors of *Independent School* with whom I worked, Catherine O'Neill Grace and Michael Brosnan, and I can only repeat: what a team.

My second indulgence: I have literally hundreds of school stories from the more than 500 NAIS schools I visited in the 10 years. The heads and association execs made it easy and rewarding for me to visit, planning and coordinating enthusiastically. One story cannot represent all the delightful experiences, but there was one that we caught on tape, so the words are exact; it says something special about the children in independent schools. In a kindergarten class, a five-year-old said to me, "I'm coloring these pterodactyls pink and blue because I'm just having fun and using my imagination. They probably were green and brown and speckled because they had to be camouflaged against their natural enemies." (This from a five year old!) Then there's The Walker School in Marietta, Georgia where the kindergarteners thought I was Peter Rabbit....

THE GLOBAL REACH OF NAIS

I recall a very small but distinct presence by international schools at the NAIS Annual Conference in the 1960s, mostly schools located in Europe. A few of the schools were truly independent by most NAIS definitions, a few were begun by the American embassy or some combination of embassies, initially U.S and Canadian. Gradually, the schools grew in numbers and in their independent characteristics, separate from the Department of Defense schools. Most schools eventually became accredited through their agencies that accredit private schools in the U.S., and, gradually, their presence grew at NAIS conferences.

Fast forward to today. Within the president's office there is a director of global initiatives. Clearly, Pat Bassett and the board have agreed on the importance of international schools and the relationship among schools throughout the globe. The impact in the past several years upon professional and curriculum development has been phenomenal.

Where did the momentum originate? I think the period of growth and commitment coincided with the relocation to Washington and its consequences in the '90s. First, the presence of NAIS in the nation's capital was important to international schools. Administrators and board members could visit the Office of Overseas Schools at the U.S.

Department of State and NAIS on the same day. In the first year in Washington, representatives of existing and planned international schools from 22 nations visited the NAIS office, most often eager to discuss advantages of membership, especially Principles of Good Practice and resource packets.

Secondly, executive directors of international associations and school heads and trustees in large numbers became aware of the value of the NAIS Annual Conference and specialized conferences – new heads, the business officers, head and chair leadership opportunities. Some international school people were not just recipients of services; they contributed significantly at conferences and they invited speakers at NAIS conferences to present at their association meetings and schools. Major speakers at NAIS became major speakers in Katmandu, Cairo, Istanbul, Managua, Bangkok, and Capetown. From Barbara Stock in Western Europe to Randolph Carter in southern Africa to Jeff Moredock in Saudi Arabia, NAIS staff participated in this global outreach.

Thirdly, the NAIS board engaged in probing discussions about the NAIS mission, not just in the U.S. but in the world, not just for independent school children but for all children. The impetus for these deliberations goes back to speeches and articles by Cary Potter in the 1970s on the public purpose of independent schools. The '90s saw increased dialogue between independent school leaders and public school counterparts and with educators from around the world. The board and staff discussions led to what some people think is today's reality: the role NAIS plays in the forefront of the interconnectedness of schools everywhere.

By the way, it is this global reach of NAIS that has expanded my horizons in retirement – wonderful retirement – limiting my presence at the NAIS Annual Conference and at the June meeting of the Country Day School Heads Association. In late February and early March, and in late June, when you all meet, I am rarely in the continental U.S. I am usually in the Middle East or Asia or Hawaii, leading workshops on governance, strategic thinking and planning, administrative team building, and the year's highest faculty priorities. I'll catch up with you someday at the Annual Conference and the CDSHA. The point is, it all started with NAIS, one small proof of the global reach and how magnificently the schools of the world are connected.

A NEW MILLENNIUM

A key as NAIS advanced into a new decade, century, and millennium was close relationships with member schools and associations, from personal contacts to the evolution of communications technologies. Every visit I made to schools, more than 50 each year, was coordinated by the state or regional association executives. By 2000, one goal for each NAIS staffer, no matter what the role, was to visit at least one member school every year. Of course, depending on one's responsibilities, many staff visited 20, 30, or more schools. It also became our practice to make major announcements – on new policies or new political stands – not from the office in Washington but at a speech to assembled independent school leaders right in the regions.

All NAIS vice presidents and directors became totally conversant with the realities and potential of the modern technologies. Donna Orem's work in curriculum and governance, Heather Hoerle's marketing initiatives, Jefferson Burnett's Public Affairs Leadership Network, Margaret Goldsborough's and Nancy Raley's communications and media services, Mark Mitchell's financial aid services, Gene Batiste's equity and justice initiatives, Claudia Gallant's professional development opportunities, Martha Galindo's research – all became available on the NAIS website with links to endless other resources.

Print remained important. All the books mentioned here continued to be marketed vigorously, and packets went out to schools, prospective members, the media, and the public in ever-increasing numbers. One packet alone from Selby Holmberg McPhee's promoting independent education office contained several components: NAIS statistics; a detailed statement on NAIS accountability to parents, students, alumni, government, and accrediting agencies; the *NAIS Executive Summary* featuring legal issues and legislative and regulatory updates; a summary of Leadership through Partnership; a preview of the Annual Conference; online book ordering instructions; the new *Global Perspectives*; and a book mark. As I recall, Selby and her staff had a dozen more ideas, but you have to stop somewhere.

My final year at NAIS was a busy time for looking ahead, creating a new strategic plan for the next five years and beyond. I doubt that it would be helpful to review the plan; better just to see what has been done, what has changed and improved since I left as president of NAIS. The process was important, because more than 100 leaders met to create the plan, hundreds more had direct input, and thousands of people responded to surveys. But the proof of the importance and validity of the plan is what has transpired since Pat Bassett became president. If you do try to bridge 1991-2001 to today's activities, I trust you will also be aware of the historical continuum of NAIS. As I mentioned at the outset, please read John Esty's article on his time as president. And read Cary Potter, too. President of NAIS from 1964 to 1978, Cary wrote a marvelous early history for the fall 1987 issue of *Independent School*, entitled "NAIS: Twenty Five or Sixty-Two?"

I called it a career in 2001, not only at NAIS but ending more than 40 years in schools and school districts and reporting to boards and government service. There was symmetry to it all – 10 years at Hawken School to begin my career in education, 10 years at the end with NAIS. Besides, wasn't I really keeping my word to John Ratté, perhaps prescient in 1991, by getting me to predict that I had 10 years at NAIS to accomplish a few things?

What retirement has meant, having a fine time continuing to work with schools in the U.S. and around the world, is an extension of NAIS's commitment. In the academic year 2005-06, I was visiting scholar at ASSETS in Honolulu for Lou Salza, at Germantown Academy in Philadelphia for Jim Connor, at Hawken in Cleveland for Jim Berkman, and as I finish this retrospective I'm preparing to leave for China with my wife, Mary Jo, to be scholar-in-residence at the Shanghai American School for Dennis Larkin.

I left NAIS the wiser for the experience, richer for the friendships, and more determined than ever that we have to continue trying to make a difference for our schools, for all schools and children, and for the world.

Peter D. Relic
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