Transitions Ahead

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NAIS... Mission, Vision, Values

VISION

All learners find pathways to success through the independence, innovation, and diversity of our schools, creating a more equitable world.

MISSION

As the largest association of independent schools, NAIS co-creates the future of education by uniting and empowering our community.

We do this through thought leadership, research, creation and curation of resources, and direct collaboration with education leaders.

VALUES

Thinking independently
We believe in independence and its power to inspire excellence.

Leading change
We imagine possibilities and innovate to strengthen the education landscape.

Embracing diversity
We welcome and encourage diverse identities and perspectives.

Championing inclusivity
We affirm the rights of every individual to belong and flourish.

Empowering community
We address complex issues through collaboration and advocacy.

Aligning and Articulating Our Approach

Pillars	How We Approach	Areas of Focus (examples, not an exhaustive list)
Leadership		Headship	Relationship-building	Management	Change management	Crisis management	Strategy	School culture/climate	Mentorship/sponsorship	Succession planning	Mid-level leaders	Aspiring leaders	Communications
Governance		Head-board chair relationship	Structure, Committees	Culture, Diversity	Responsibilities (Fiduciary, generative, strategic)	strategic planning	head search		Recruitment/sourcing	Training/orientation	Assessment/evaluation	Financial sustainability
Equity & Justice		Diversity	Equity	Inclusion	Belonging	Access and affordability
Community Well-Being		Mental/emotional	Physical/self-care School safety Engagement	SEL	Character /skills/purpose	Time management	Self-harm	Sex abuse, sexual assault	Parent-School Partnership
Strategy/Innovation		Teaching and Learning	Strategic Planning
School Operations		Finance/Financial Sustainability	Revenue	Expenses	Enrollment	Affordability	Tuition (models, willingness vs. ability)	Fundraising/philanthropy	Financial Aid	Salary/Compensation	Hiring/Recruitment	Retention	Evaluations/assessments	Facilities/physical plant	Risk management	Marketing/student recruitment

Hot Issues Survey

- Finding and Retaining Qualified Staff as Workplace Expectations Shift

- Responding to Conflict In and About Independent Schools

- Caring for Students and Staff Through Stressful Times

- Ensuring the School's Sustainability

- Balancing the Demand for More Programs with Available Resources and Existing Initiatives

# Reframe, Relaunch, Refresh

Long game...

Having purpose and making a positive impact

Improving lives and sustainability for our schools, our school leaders, and our students

Identifying the next set of opportunities, challenges, experiences, and resources to bring to our schools so that they can thoughtfully address missions in context with less legwork

Re-Engaging Our Why

People don't buy **what** you do, they buy **why you do it**.

- Simon Sinek

Goalcast
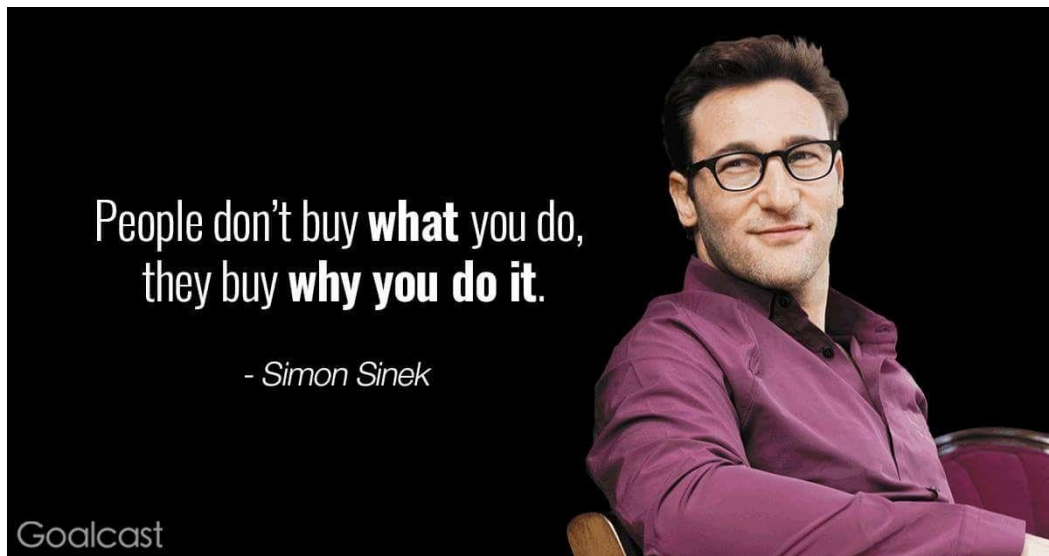
Simon Sinek, author of *The Infinite Game*. See video.

The Infinite Game

Infinite Games: Play to keep playing

Finite Games: Play to win

Infinite players v. Finite players

- Infinite players will have a rolling list of finite competitors over time
- Small initiatives might be finite games

There is only ahead or behind, there is no real winning

How do we become a better version of ourselves?

How do you play?

- Just cause
- Courageous leadership
- Trusting teams
- Worthy rival
- Flexible / open playbook

How do you play?

Just cause: Compelling vision of the future that doesn't exist yet

Courageous leadership:

- Acceptance of the awesome responsibility to create an environment in which people can work at their natural best.
- Providing needs (as opposed to just wants)
- Advancing the long-term even at the sacrifice of the short-term

How do you play?

Trusting teams:

- Environment in which people can raise their hands and ask for help without fear of retribution, humiliation, or punishment
- Ability to use judgment & do the jobs for which they have been trained and hired
- Not distracted by self-defense or other drama

How We Build a Culture of Trust

When we work
on a Trusting Team,
we feel safe
to admit our mistakes,
be honest about our
shortcomings,
and ask for help
when we need it.

@simonsinek

- Building a culture of trust "requires a continued, collaborative effort from all team members to strengthen relationships by modeling compassion and prioritizing psychological safety." – Center for Creative Leadership
- Trust and transparency (and "open playbook") allow us to be flexible and adaptable in our strategy.
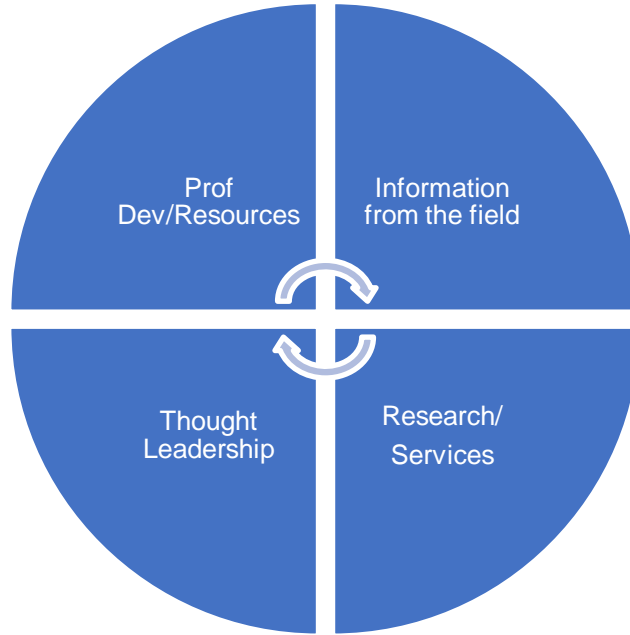- Trust allows us to try and fail... and try again.

How do you play?

Worthy rival:

- Competitor allows you to see your weaknesses

Flexible / open playbook

- **Flexible strategies** and plans that change as needed to pursue the *just cause*
- **Transparent** with strategies, so all members of the team can be on the same page.
- "Leaders resist being too transparent with information because they fear losing control. They distrust how people will use that information, so they hold it close to the vest. That only results in people making sub-optimal decisions because they don't know all the plays in the playbook.."

Information and Action Cycle

Purpose and Impact

Thought Leadership	Change	What challenges/ opportunities are around the corner that NAIS can help identify and decode?
Growth Areas	Wants	What do schools want more of as they evolve?
Fundamentals	Needs	What do school need in order to do what they do every day?

Reframe

- **Who we are as an organization and what we do / how we do it**
  - Provide greater clarity around the differences and importance of context: size, regionality, political realities, etc.
- **Deeper, organized work** in governance, leadership (and supporting leaders), diversity, wellness, learning and teaching, and how we present them
  - What are our systemized approaches to:
    - Leadership education, Governance training and work, Student health and wellbeing, Scaffolding of diversity work?
  - What are the follow-up steps to the research challenges identified?
- **What do you need to operate successfully as a school?**
  - Essentials are often the most helpful thing
- **Claiming ground**: Being the proud, national voice of independent school education.

Refresh

Our **engagement and our language**

Our **collective community meaning and experience**

What is education all about / why do we do it?
- Michael Horn: What is the purpose of schooling?

Why is **independent education uniquely transformative** and why does it need to be preserved?
- Defining and highlighting the beauty and opportunity in our schools.

What are we all about as an industry and as an association?
- Public purpose, excellence, modeling, scenarios and shared solutions.
- Who we are and purpose of who we are as a community
- Student success in healthy communities

Relaunch

Reenergizing as the national voice of independent education in the United States, as well as a substantial stakeholder in the international voice of independent education

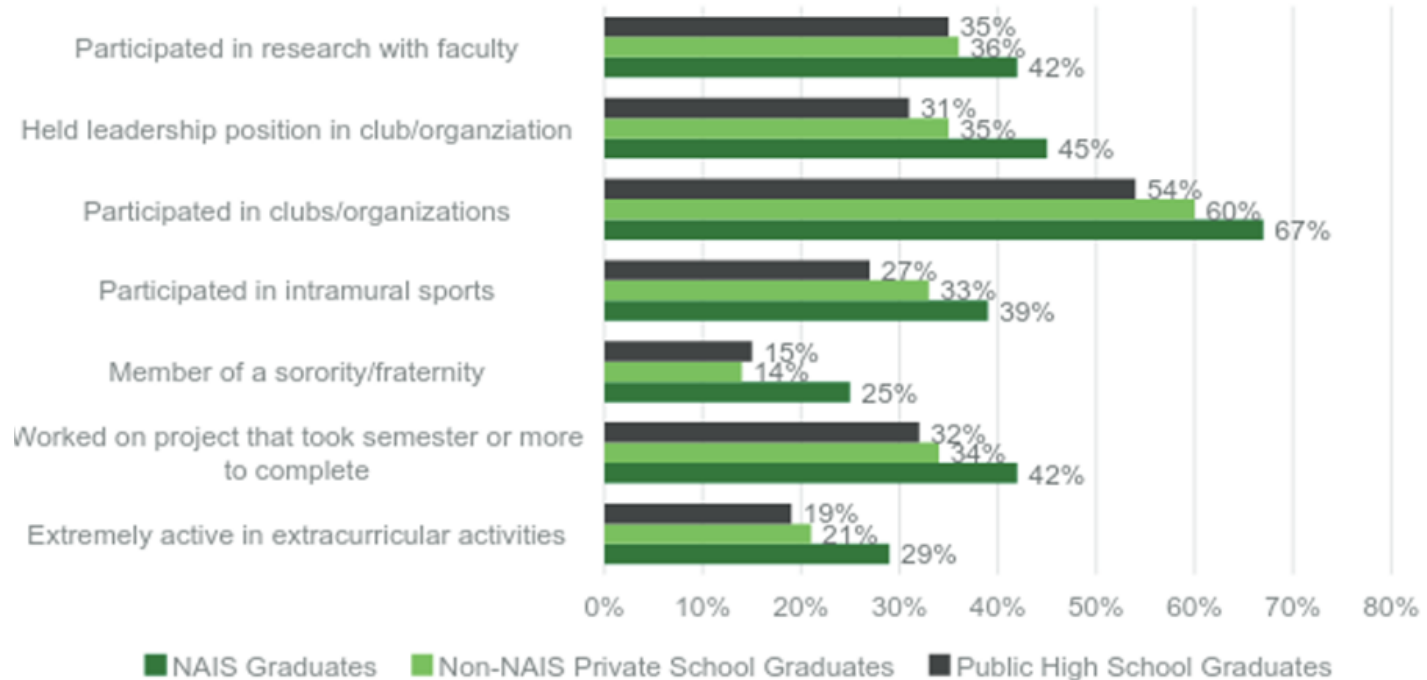**Who we are, why we matter –** with energy and resonance

Purpose of independent school education and the power of the collective independent school community

On my mind…

19

Districts, Charters, & Independent Schools: We have great outcomes

Participated in research with faculty — 35%, 36%, 42%
Held leadership position in club/organziation — 31%, 35%, 45%
Participated in clubs/organizations — 54%, 60%, 67%
Participated in intramural sports — 27%, 33%, 39%
Member of a sorority/fraternity — 15%, 14%, 25%
Worked on project that took semester or more to complete — 32%, 34%, 42%
Extremely active in extracurricular activities — 19%, 21%, 29%

0% 10% 20% 30% 40% 50% 60% 70% 80%

■ NAIS Graduates ■ Non-NAIS Private School Graduates ■ Public High School Graduates

TOP CHALLENGES IDENTIFIED BY HEADS OF SCHOOL

100%

1. Finding and retaining qualified staff as workplace expectations shift

97%

2. Responding to conflict in and about independent schools

96%

3. Caring for students and staff through stressful times

91%

4. Ensuring the school's sustainability

83%

5. Balancing the demand for more programs with the available resources and existing initiatives

0%　　20%　　40%　　60%　　80%　　100%

The Workforce

Teacher Dissatisfaction
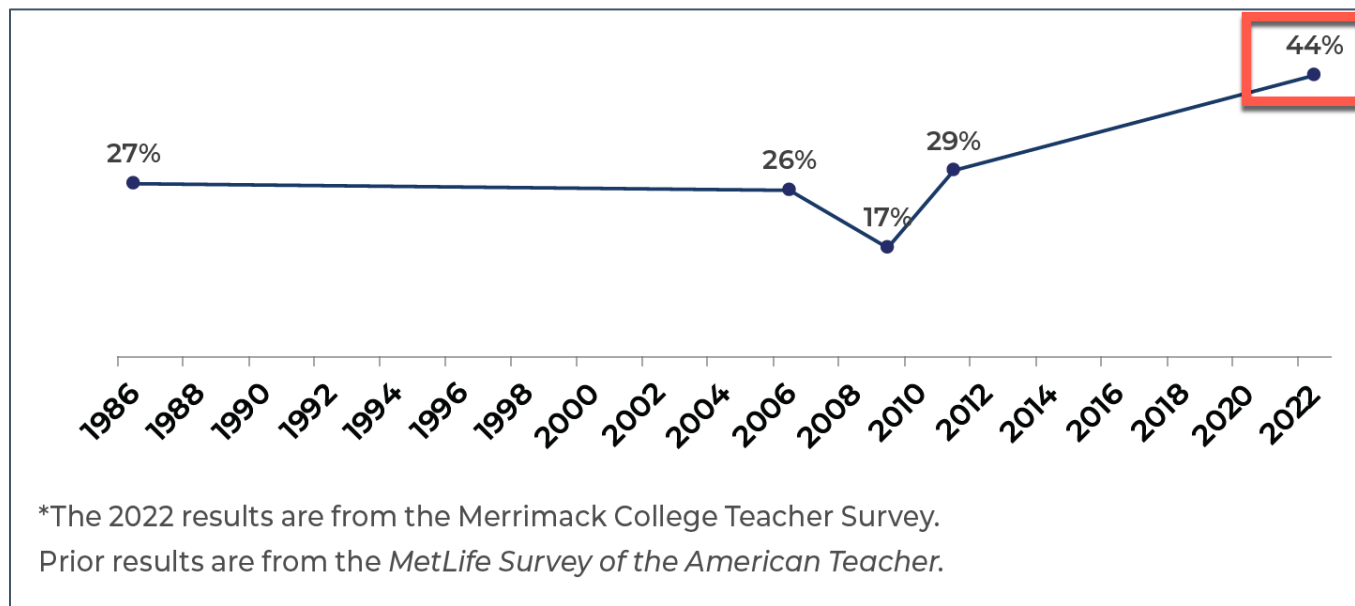
44% of American K-12 teachers in 2022 said they were fairly or very likely to leave the profession to pursue a different occupation.

*The 2022 results are from the Merrimack College Teacher Survey.
Prior results are from the *MetLife Survey of the American Teacher.*

SOURCE: Merrimack College Teacher Survey, MetLife Survey of the American Teacher

NAIS Teacher Salaries

Independent School Teachers' Salaries Adjusted for Inflation, 2018-2019 to 2022-2023
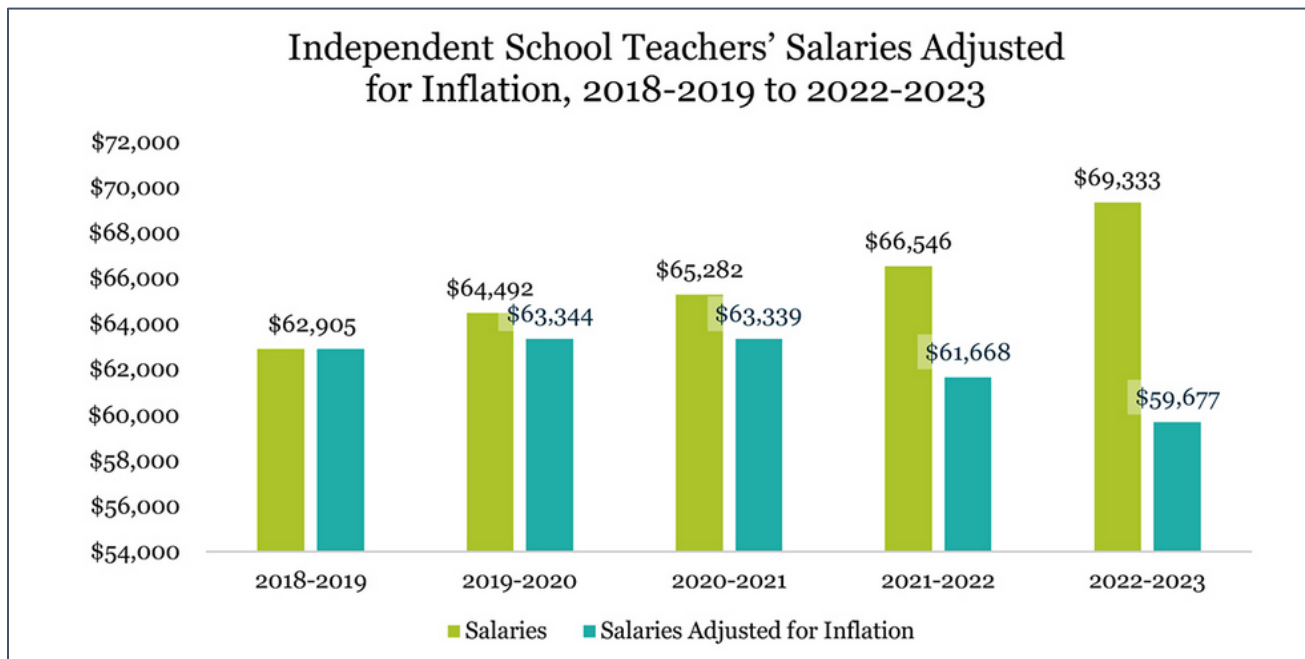
NAIS teachers' salaries in 2022-2023 were lower than in previous four years, when adjusted for inflation.

SOURCE: NAIS, 2021 Teacher Satisfaction Survey

Teacher Wage Penalty

Teachers earn 23.5% less than comparable college graduates

Public school teacher weekly wage penalty (or premium) for all teachers and by gender, 1979–2021

Data points: 6.5%, 4.1%, -0.1%, -7.1%, -5.1%, -6.1%, -16.6%, -13.1%, -15.1%, -17.1%, -23.5%, -35.2%

Legend: All, Women, Men

SOURCE: Economic Policy Institute
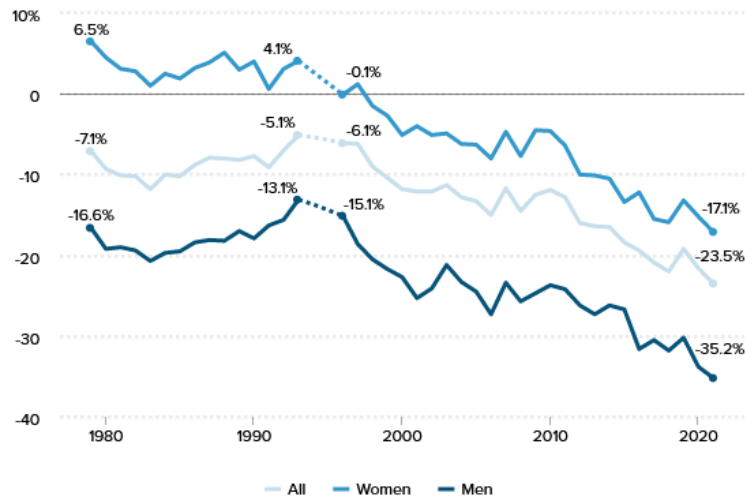
Public school teachers earn 23.5% less than comparable college graduates.

Unexpected Turnover: NAIS

Share of unexpected turnovers in all head of school turnovers, by school size, 2022-2023
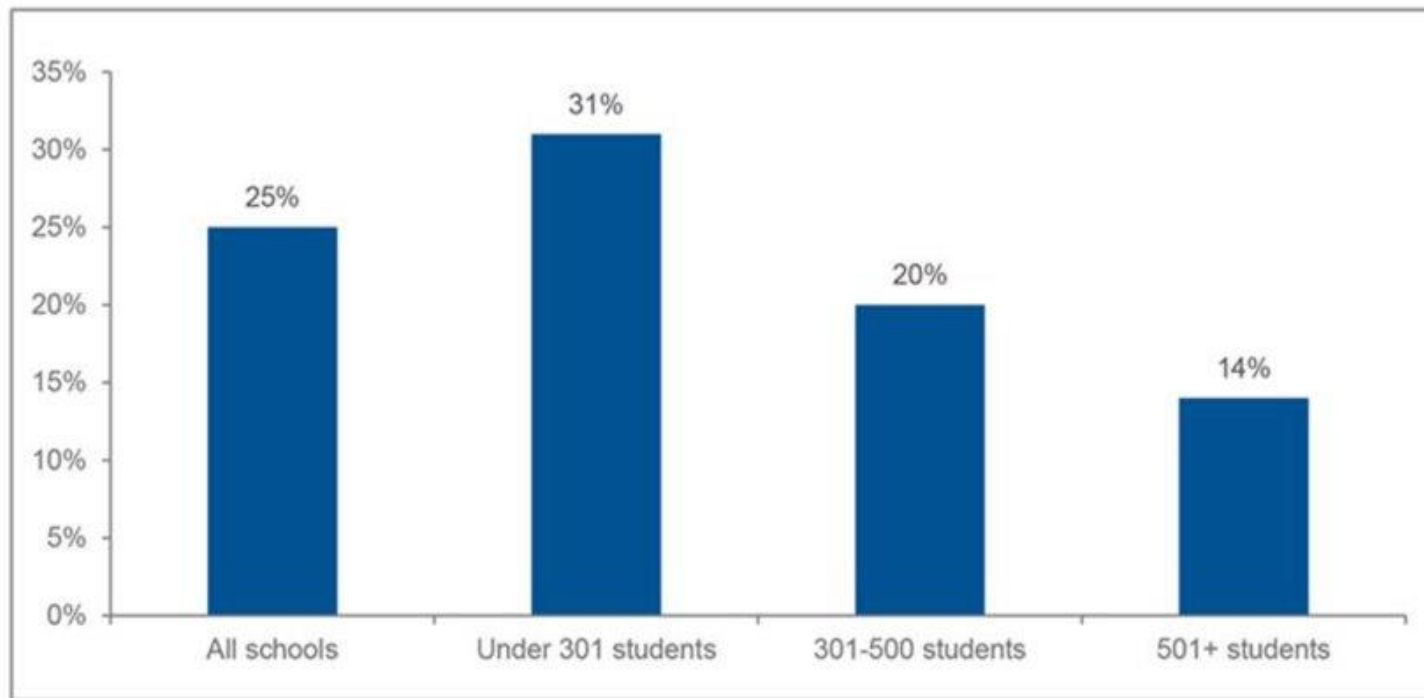
Trust

Trust in Institutions

Average Confidence in Major U.S. Institutions, 1979-2022

Figures are the average percentage of U.S. adults who have a great deal or quite a lot of confidence across institutions asked consistently by Gallup.
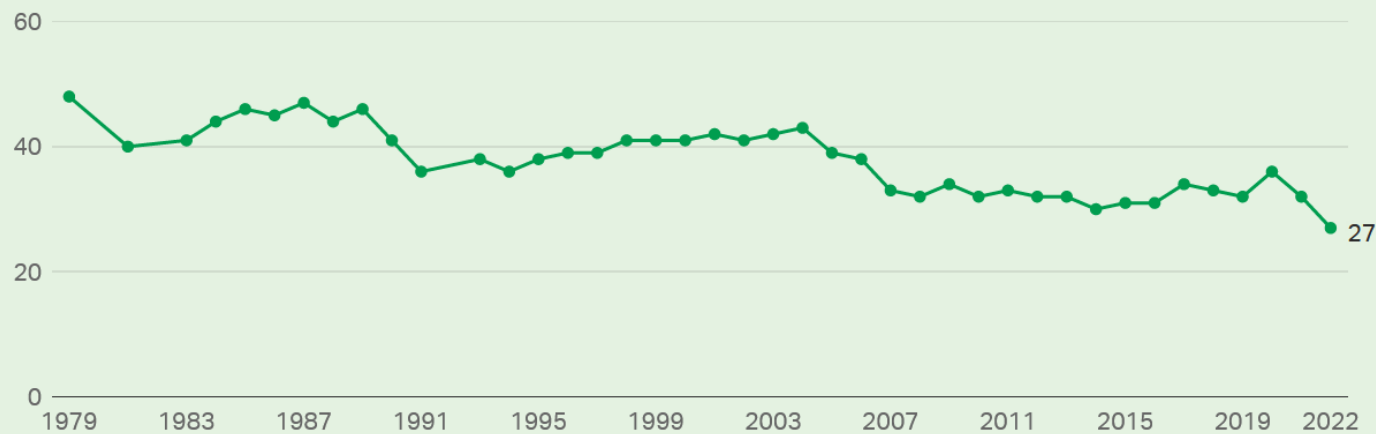
SOURCE: Gallup

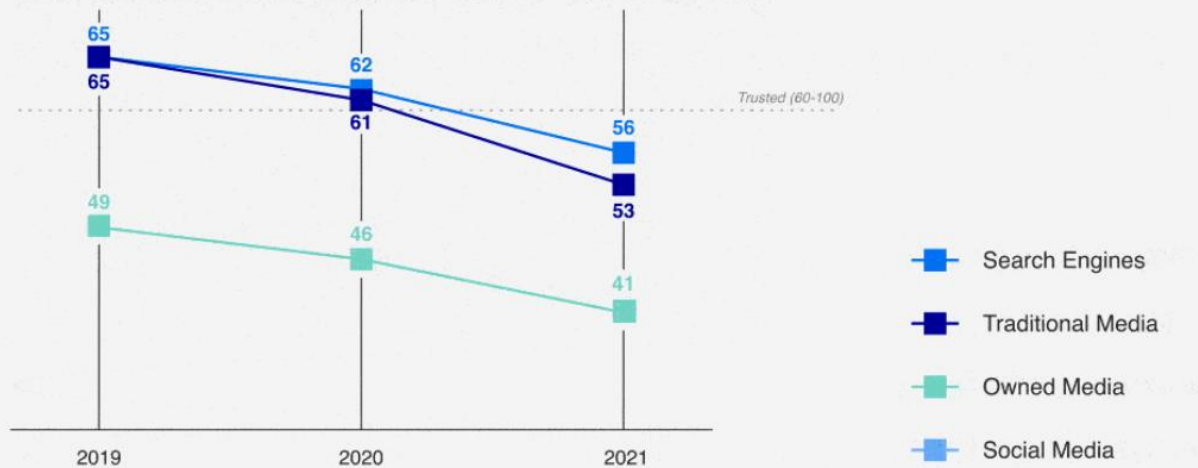Confidence in institutions, including public schools, at an all-time low.

Social Media Structure

SOURCE: Tobias Rose-Stockwell, Nature.org
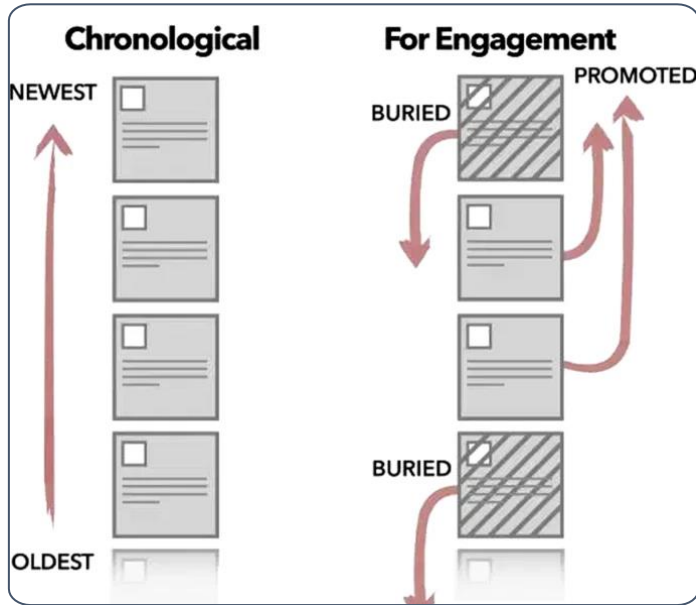
- **Polarizing posts consistently achieve high engagement:** Facebook internal research team reported it was feeding "more and more divisive content in an effort to gain user attention and increase time on the platform."
- **Strong moral charge:** Establishes two sharply opposed camps controversial topic, championing one group while condemning the other.
- **Offensive material hits a nerve:** "Emotional reactions like outrage are strong indicators of engagement."

Trust in Information

TRUST IN INFORMATION SOURCES AT RECORD LOWS

Percent trust in each source for general news and information (Global 22)

Trusted (60-100)

- 65, 62, 56 — Search Engines
- 65, 61, 53 — Traditional Media
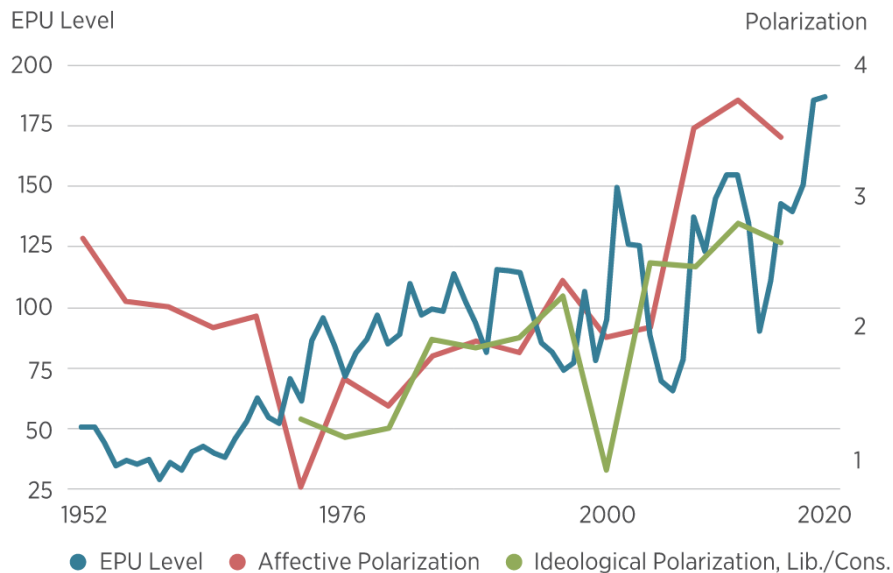- 49, 46, 41 — Owned Media
- Social Media

2019　2020　2021

Note a dramatic recent shift in trust in sources of information and news.

SOURCE: Edelman Trust Barometer 2023

Impact of Polarization on Policy Uncertainty

Figure 1: Polarization in US Presidential Elections and EPU

Economic policy uncertainty (EPU) rises around national elections, especially when those elections are polarized and close.

SOURCE: Beckerman Friedman Institute at The University of Chicago

Impact of Polarization on Legislation

- State levels
- Local levels
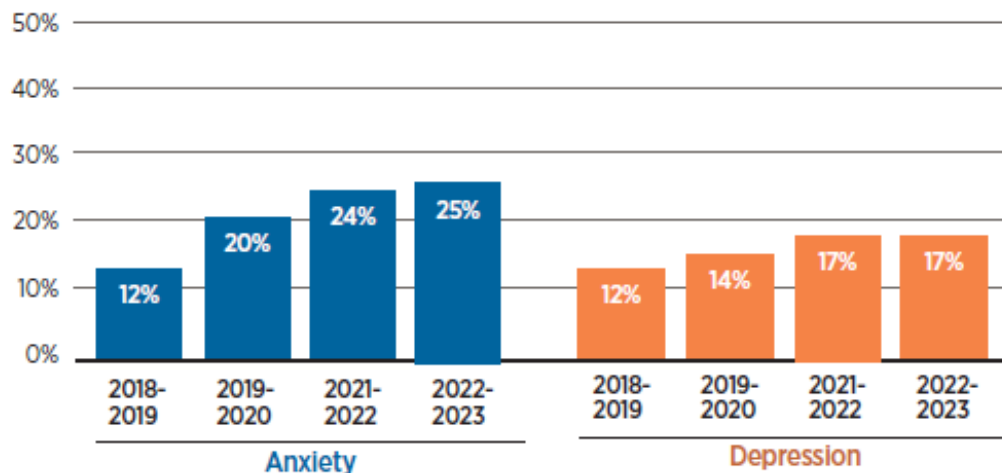- National levels: coming back with a vengeance

Student Experience

Post-Pandemic at **NAIS Schools**

FIGURE 3: Students Have Experienced More Anxiety and Depression Since the Pandemic

*Independent high school students diagnosed with anxiety and depression by a professional*

	Anxiety				Depression		
	2018-2019	2019-2020	2021-2022	2022-2023	2018-2019	2019-2020	2021-2022	2022-2023
	12%	20%	24%	25%	12%	14%	17%	17%

Source: Independent School Health Check, Special Reports

SOURCE: Independent School Health Check

Anxiety has grown among NAIS students since the pandemic.

Mental Health Concerns at NAIS Schools

FIGURE 4: Mental Health Concerns Are Manifesting as Suicide Threats or Incidents at Many Schools

Schools that dealt with a suicide threat or incident in the first half of the 2022-2023 academic year

Elementary schools	Secondary schools	Elementary-secondary schools	All schools
44%	50%	63%	56%
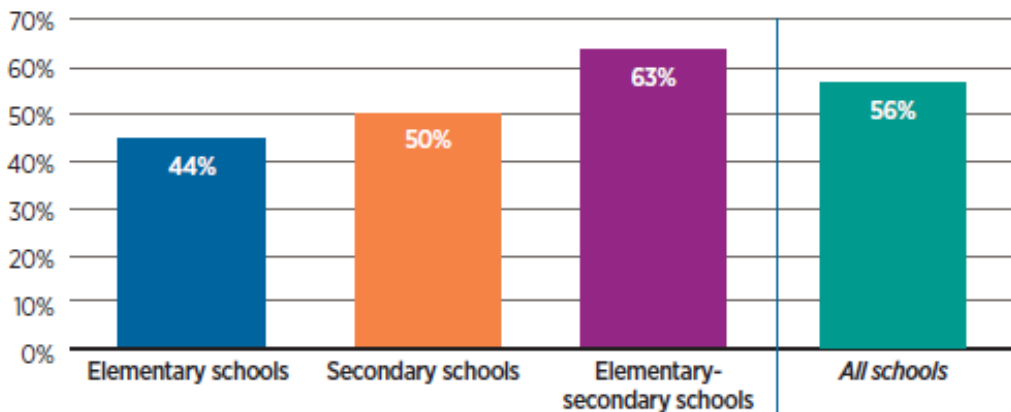
Source: NAIS Snapshot Survey, "Security Measures," Week of January 23, 2023

Two thirds of NAIS schools dealt with a suicide threat in the first half of the 2022-2023 year.

SOURCE: NAIS Snapshot Survey

Diversity

- The world our students experience is and will be remarkably different than ours.

- We have an obligation to provide the same exceptional experience to all students. This is not always happening.

- The families we serve now are often not structured like or reflect the families that our systems were created to serve (e.g., by income, family work obligations, learning differences, religion, etc.).
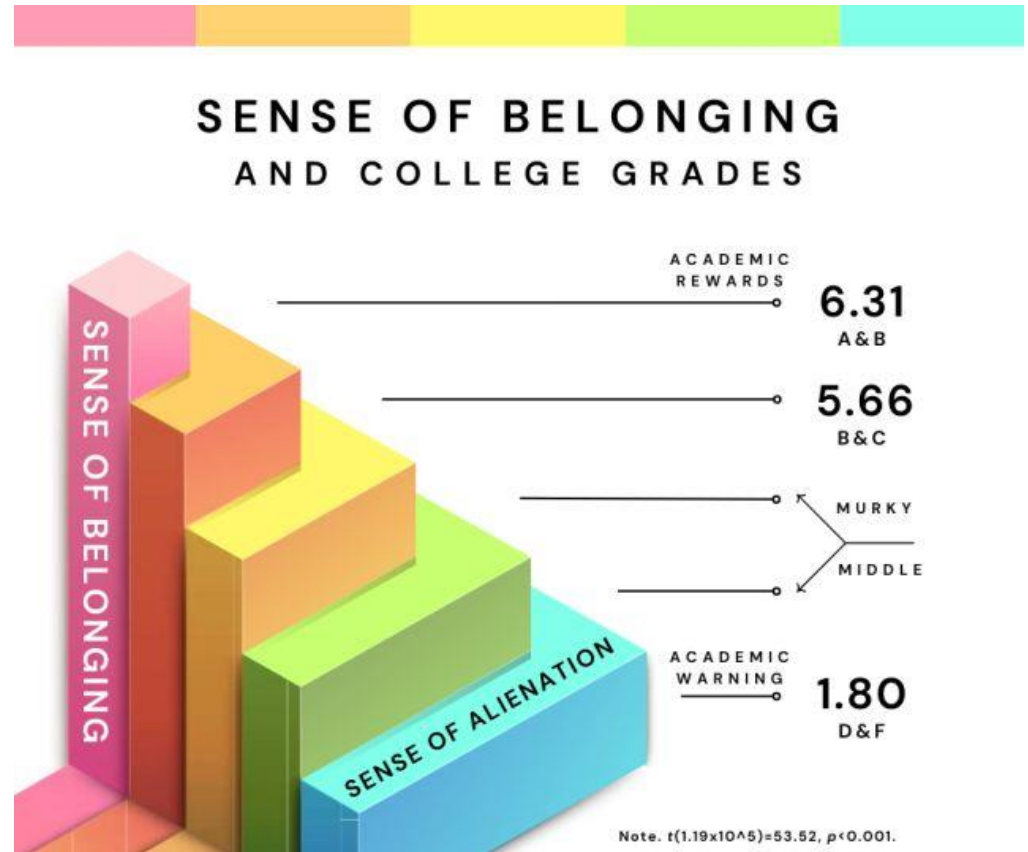

The United States is becoming more diverse

U.S. POPULATION BY RACE (% OF TOTAL)

Legend: Other, Asian and Pacific Islander, Black, Hispanic, White
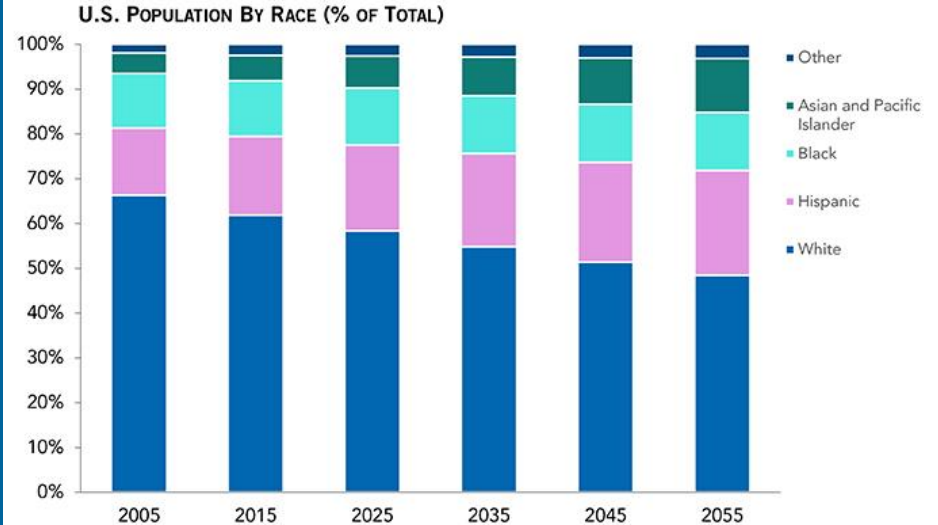
SOURCE: Pew Research Center population projections, September 2015. Compiled by PGPF.
Note: Whites, Blacks and Asians include only single-race non-Hispanics. Hispanics are of any race.
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PGPF.ORG

# Belonging, Learning, and the Brain

SENSE OF BELONGING AND COLLEGE GRADES

SENSE OF BELONGING

SENSE OF ALIENATION

ACADEMIC REWARDS — 6.31 A&B

5.66 B&C

MURKY MIDDLE

ACADEMIC WARNING — 1.80 D&F

Note. $t(1.19 \times 10^5) = 53.52$, $p < 0.001$.

Sustainability Enrollment Affordability

Projected Private School Enrollment Growth

Figure 6a. U.S. Private High School Graduates, Class of 2001 to 2017 (reported) and 2018 to 2037 (projected)
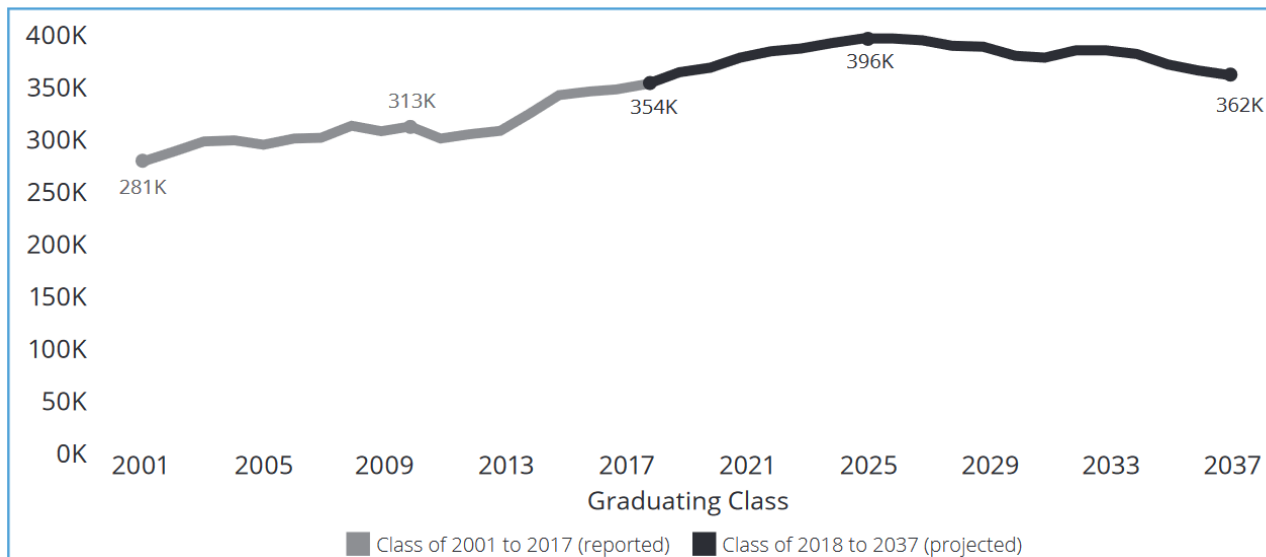

U.S. private high school grads are projected to increase in number by as much as 13% from the Class of 2017 to the Class of 2025 and continue to grow through the Class of 2030.

SOURCE: Western Interstate Commission for Higher Education 2020

NAIS School Enrollment by School Size

FIGURE 7: Enrollment Gains Have Been Concentrated In Large Schools

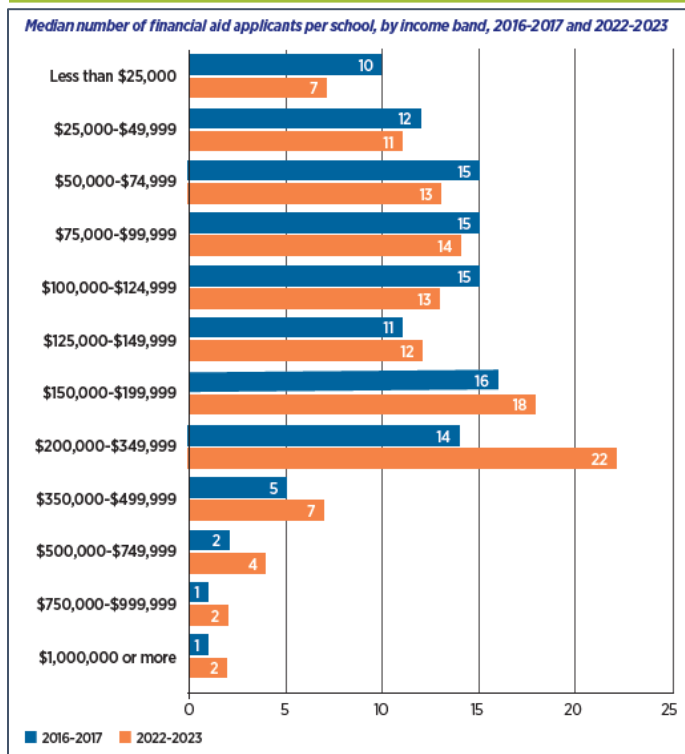*Change in median enrollment by school size, 2018-2019 to 2022-2023*
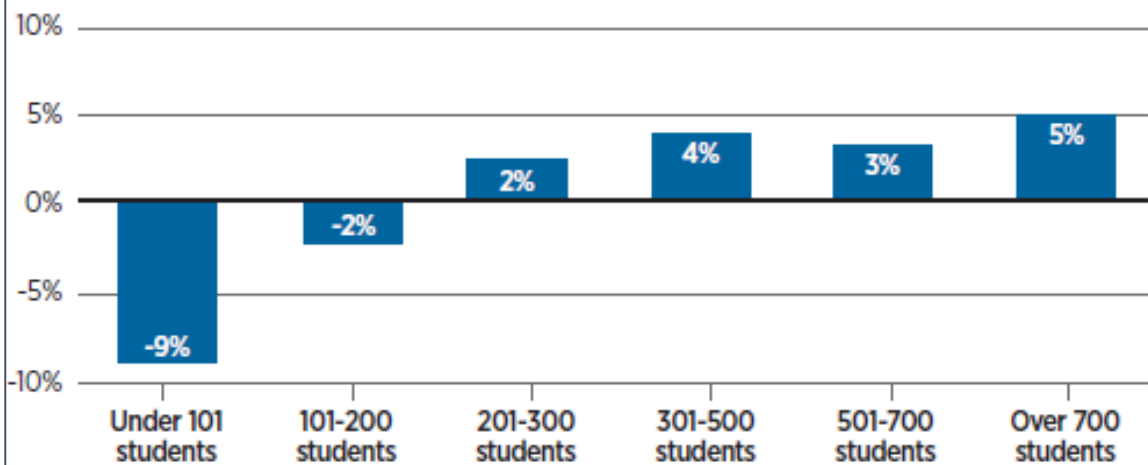
In NAIS schools, recent enrollment gains have been concentrated in large schools.

SOURCE: NAIS, Data and Analysis for School Leadership (DASL)

Changing Profile of Financial Aid Applicants

Median number of financial aid applicants per school, by income band, 2016-2017 and 2022-2023
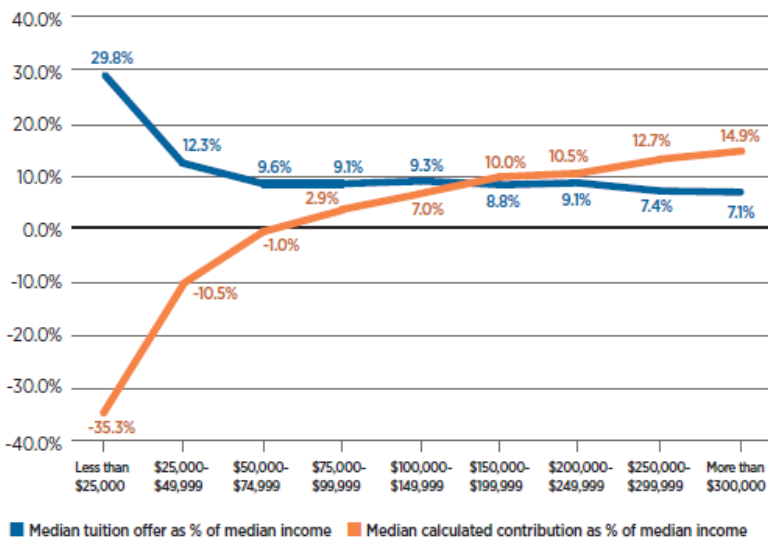
Higher-income families make up a greater number of financial aid applicants at NAIS schools today compared to 2016-17.

SOURCE: NAIS, Data and Analysis for School Leadership (DASL)

Family Willingness by Income Level

FIGURE 7: Lower-Income Families Offer a Greater Percentage of Their Income Toward Tuition

Families' willingness to contribute toward tuition versus SSS calculated contribution, as a percentage of income, 2022-2023

Median tuition offer as % of median income (blue): 29.8%, 12.3%, 9.6%, 9.1%, 9.3%, 10.0%, 10.5%, 12.7%, 14.9%

Median calculated contribution as % of median income (orange): -35.3%, -10.5%, -1.0%, 2.9%, 7.0%, 8.8%, 9.1%, 7.4%, 7.1%

Income brackets: Less than $25,000 | $25,000-$49,999 | $50,000-$74,999 | $75,000-$99,999 | $100,000-$149,999 | $150,000-$199,999 | $200,000-$249,999 | $250,000-$299,999 | More than $300,000

■ Median tuition offer as % of median income ■ Median calculated contribution as % of median income

SOURCE: School and Student Services (SSS), Community Brands

Lower-income families offer a greater percentage of their income toward tuition at independent schools.

Education Data Initiative

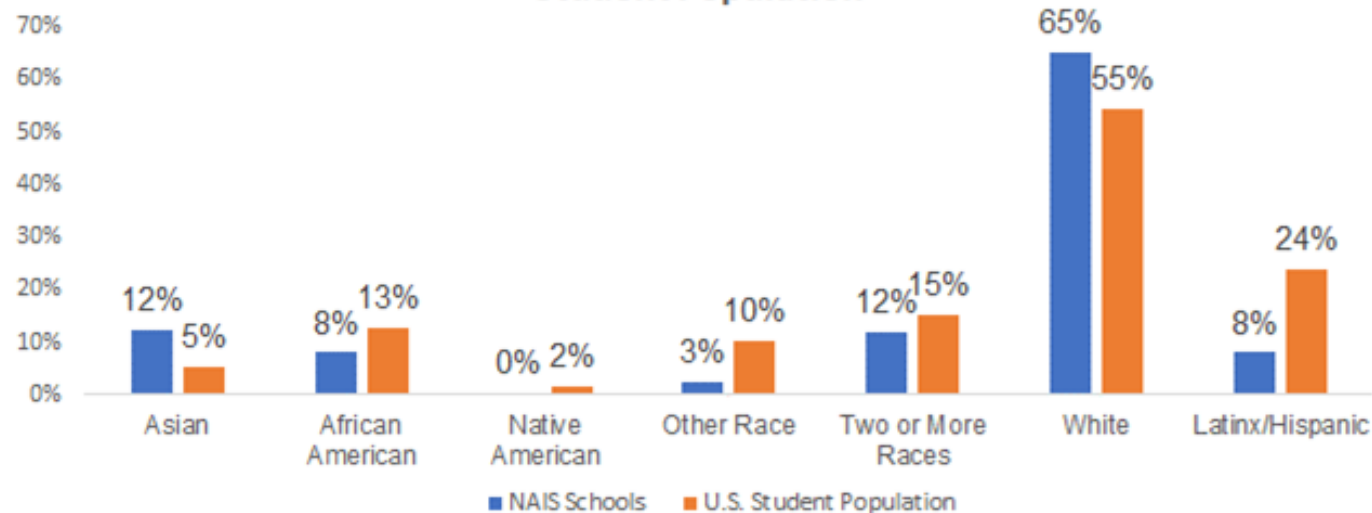**COST-OF-ATTENDANCE & NON-TUITION EXPENSES**
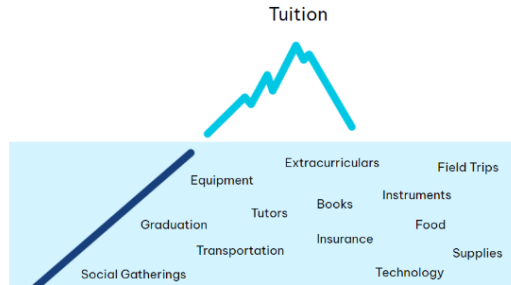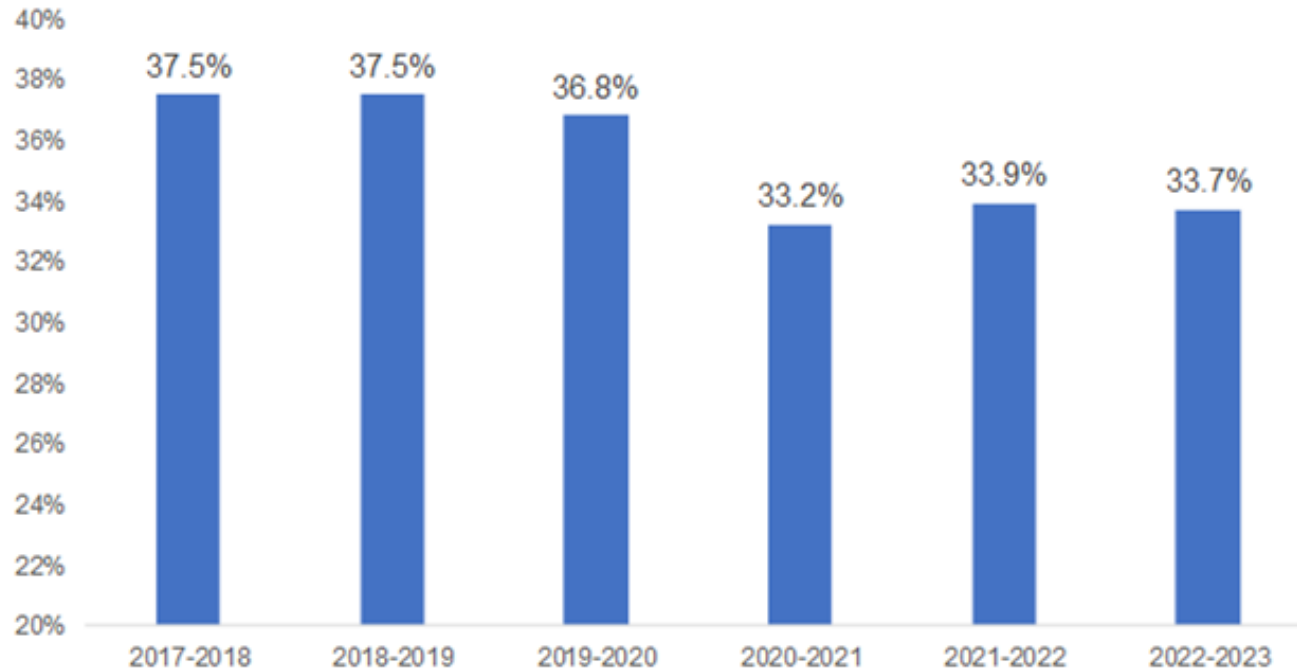

Scope of the Issue
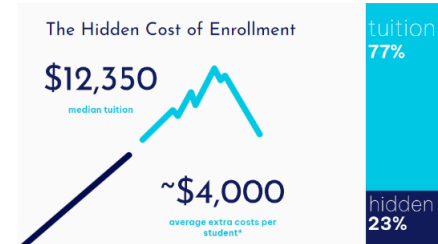
Demographics

Demographics

2022-2023 Students by Race and Ethnicity: NAIS Schools vs U.S. Student Population

Sources: NAIS, Data and Analysis for School Leadership (DASL) and Demographic Center.

Students of Color as % of Enrollment

Source: NAIS Data and Analysis for School Leadership

Technology

AI and Education

- **Personalized learning and tutoring:** Khanmigo, Hobbes
- **Streamline all administrative tasks:** Lesson plans, feedback loops, essays and critical thinking, HR, accounting, etc.
- **Increased possibility of predictive analytics:** Existential issues: Yes, but
- **Better use of data:** Holy grail of understanding the student journey and where things go well and spotting where they do not. Ability to predict future trends taking in a LOT of information.

Price Changes

Price Changes: January 2000 to June 2022
Selected US Consumer Goods and Services, Wages
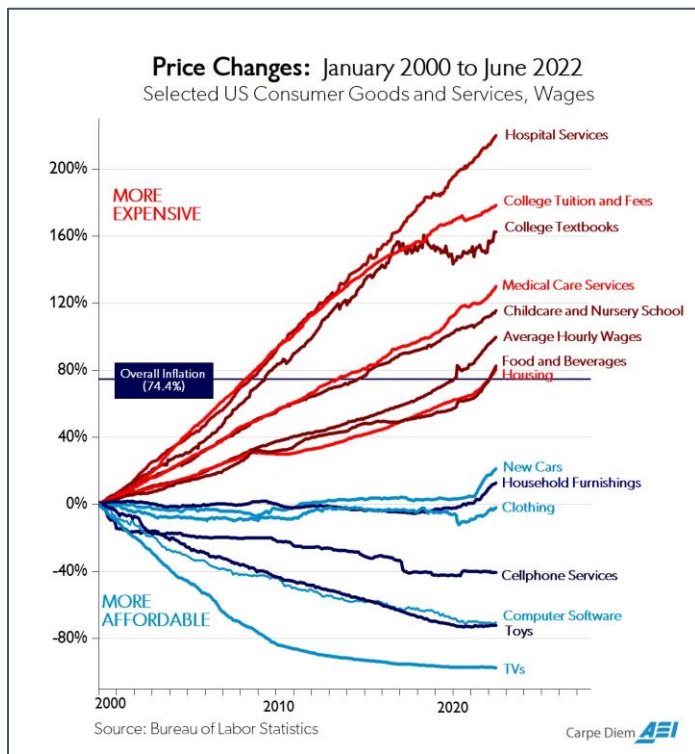
Education costs were among those that grew most steeply from 2000 to 2022.

SOURCE: Bureau of Labor Statistics

Why AI Won't Cause Unemployment

We are heading into a world where a flat screen TV that covers your entire wall costs $100, and a four-year college degree costs $1 million, and nobody has anything even resembling a proposal on how to systemically fix this.

Why? The sectors in red are ***heavily* regulated and controlled and bottlenecked by the government and by those industries themselves**. Those industries are monopolies, oligopolies, and cartels, with extensive formal government regulation as well as regulatory capture, price fixing, Soviet style price *setting*, occupational licensing, and **every other barrier to improvement and change you can possibly imagine**. Technological innovation in those sectors is virtually forbidden *now*.

Whereas the sectors in **blue are less regulated, technology whips through them, pushing down prices and raising quality every year**.

Marc Andreessen

Higher Education

Supreme Court Decision & Impact

Colleges:

- may no longer use race as an off-the-cuff consideration
- might look at legacy, athletes, and students from independent schools as also favored in process
- might offer more $$ with income cut-offs
- might weigh essays as even more important
- might change recruitment patterns and strategies

Telling the story of your school and that of your students is even more important, both coming and going.

Application Numbers

Common App application volume in February 2022 showed a 10 percent increase compared to the preceding year—which itself was up some 10 percent from the year before that.

Over the past two decades, the number of applications submitted to colleges has increased more than 150 percent, even as the size of high-school graduating classes has remained fairly stable.

Common App Problem

At hypercompetitive schools, ridiculously **low acceptance rates** have become the norm: 5% at Stanford University, 10% at Colby College, and 12% at Vanderbilt last year.

But **selectivity is something of an illusion**, stressing students out and leading them to needlessly apply to multiple colleges when they can enroll in only one.

Upper Middle Class Dreams...

- State flagships pouring money into out of state recruitment for more $$s, setting up pipelines

- Upper middle class (UMC) families wanting UMC dreams and adventures for their kids. At the same time, they feel insecure and crunched. $80,000-90,000/year for private college = serious sticker shock. However, out-of-state tuition at OSU is "only" (ha!) 36K which is steep, but more palatable than 60K+ at most privates. State flagships know that families, even relatively affluent ones, are price sensitive.

- Peak of population growth for high schoolers, although now more seats taken up by out of state students (see top bullet point)