



**EPISCOPAL
SCHOOLS**

**National Association
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Establishing an Episcopal School

Are you, your congregation or a group of individuals exploring the establishment of an Episcopal school or Early Childhood Education program in your community or diocese? If so, you are not alone. In 2004, the NAES database records some 48 congregations or groups considering the establishment of an Episcopal school or ECE program. Since 1990, 97 Episcopal schools and ECE programs have opened their doors. Episcopal schools are being established or are expanding at a rate not seen in decades and represent one of the most vital ministries of today's Church.

You are about to embark on an exciting journey of exploration and discernment, and the National Association of Episcopal Schools is ready to assist you with consultation services, publications and conferences. To begin working with NAES, all you need to do is:

- Complete and return the two page "School Exploratory Committee Contact Form."
- Call our office to schedule an initial one-hour conference call with a member of our staff.
- Before your telephone appointment, share and discuss with your fellow committee members all of the materials you've received, recording any questions you may have.

We look forward to supporting and working with you in this endeavor.

If you have other preliminary questions, please contact us at 800.334.7626, ext. 6134, or 212.716.6134, or via e-mail at [<info@episcopalschools.org>](mailto:info@episcopalschools.org).

NAES...Serving Those Who Serve Episcopal Schools.



School Exploratory Committee Contact Form

Committee Contact Information

Committee Name _____

Name of Sponsoring Organization _____

Mailing Address _____

Telephone _____ Fax _____

Email _____

Name of Contact Individual _____

Contemplated School

When the school is "finished," what will it be like? *(Please circle one descriptor on lines 1-3)*

1. Day Boarding Boarding and Day
2. Parish Cathedral Diocesan Independent
3. Co-ed Boys Girls
4. Grades served _____

In the school's first year, what grades do you plan to serve? _____

About the Committee

When did conversations begin about starting a school? _____



Has the committee been duly constituted and authorized by the Vestry/Diocese? _____

Date of initial Committee meeting _____

How often does the Committee meet? _____

Numbers of members? _____

Please describe who is on the Committee _____

Other information you think NAES should know

For NAES use: Telephone Conference _____

Database _____



Some Thoughts on Exploring the Establishment of an Episcopal School

The Rev. Jonathan T. Glass

Over the last several years, the NAES office has received many calls of inquiry about starting new Episcopal schools and preschools. A number of exploratory committees have been established, and some very significant advances in the ministry of Episcopal schools have resulted. Since 1997, 28 Episcopal schools and Early Childhood Education programs have opened. While the results are impressive, the demands on exploratory committees, founding boards, and founding heads are great. The NAES staff is always ready to offer assistance, to share perspectives, and to put committees in touch with other leaders who have worked through similar issues. A great deal can be written about the ministry of beginning a new school, but I would like to offer some observations derived from my work with many different leaders in many different school settings. They are hardly systematic, but they are offered to spur ongoing discussion among exploratory committees, young schools, and established programs that find common concerns with their new peers in governance, communication, and advancement issues.

Opening a new Episcopal school is important. Just as important

is the manner in which the decision to open has been reached, implemented, and communicated.

Liberating ourselves from the fear of failure is a vital first step in the exploratory process. If a new Episcopal school results from the exploratory work, then God be praised. But it is preferable to delay, suspend, or terminate a school exploration process than to open prematurely. Parents who are interested in a new Episcopal elementary or middle school must understand that the chances are good that their own children may not benefit directly if a full school establishment time line is followed. Such a time line allows plenty of space for careful feasibility studies, advancement work and donor cultivation, the creation of a detailed business plan as part of a foundational strategic plan with both short, medium and longer range goals, and a thorough search process for the founding head. Schools are started for the sustainable, rather than the immediate, future. Exploratory work takes time, often three or four years. If there is good communication between the exploratory committee, its sponsoring body, and the church and at-large communities, then a decision to open



or not to open will be understood and supported by all constituencies. Failing such clarity, decisions about the fate of a school exploration process can be divisive.

The sooner the vision of individuals can be shifted to the work of exploratory committees, the greater the chance of success and sustainability.

We walk a fine line in this area. On the one hand, the personal commitment and dedication of a small number of leaders who can see the school in their minds' eyes with clarity—and can communicate that vision to others—is of abiding importance. At the same time, that charismatic gift needs to be exercised within a framework of accountability, measured performance, and regular evaluative work. The decision to open—or not to open—a school is not a matter of personal opinion or individual influence, but the result of due and diligent process. The best way to accomplish this goal is through the work of an exploratory group which regularly reports to a supervising body. Such a system also assists the transition from exploratory committee to founding school board. In parish day school exploratory work, this supervising entity is the Vestry. Diocesan schools would report directly to the Bishop or to an appropriate diocesan committee. Independent Episcopal schools face a challenge in determining to whom they

should be accountable. It might be an advisory board established for that purpose and which could continue its work, when the school opens, as being “of counsel” as appropriate. Given the relatively high turnover of boards these days, institutional memory might also be sustained in such an advisory board, increasing the chances for continuity in governance and consistent attention to matters such as the school's Episcopal identity.

The search process for the founding head lays the foundation of the school's culture. In addition, the transition from exploratory committee to founding school board is of critical importance.

The effective communication of qualities, experiences, and documented accomplishments which the search committee seeks in the founding head of school will produce finalists who enthusiastically share the founding board's vision for the new school. The manner in which the search is conducted will establish a very important precedent for the future. Fairness, consistency, and clarity about the new school's mission can all be shown far and wide through an exemplary search process. In most cases, it is desirable for the founding head of an elementary, middle, or secondary school to be in place for at least a year before classes begin. Founding Early Childhood Education program



directors should usually be in place for at least six months before school begins. Why? Just as the initiation of a search process often marks the transition from exploratory committee to school board, so the presence of the founding head on site marks the transfer of a number of administrative duties from the board to the head. The head also begins new work which has not been part of the board's duties, such as faculty recruitment and curriculum development. These transitions have two important goals: to enhance continuity in governance so that the school's mission is continually affirmed and consistently reviewed; and to clarify roles and responsibilities so that the head, leading faculty, and staff are empowered to administer the school effectively and the board exercises its oversight of the school with skill and diligence. The board and the head have a wonderful opportunity to collaborate in that first year and to work out any glitches in the structure or details of their relationship before the pressures of an actual school year make that proactive work more difficult.

The procurement of financial aid monies for awards to qualifying students is an essential task of school start up work.

Time and again, many young schools find themselves unable to award as much financial aid as they would like and thus

the school does not achieve as much economic diversity as it would otherwise seek. Two points are important here. First, donors who are interested in contributing to financial aid funds need to be cultivated early on in the exploratory process, along with those who might give land or the funds for construction. Such gifts are of equal importance. Second, the planning for the first several school budgets needs to provide for the dedication of an intentionally determined percentage of all tuition monies for financial aid. It may not be possible to move to 10% for some years, but some definite percentage is possible. These initiatives allow the school to make its commitment to economic diversity and social justice as clear as possible from the earliest days of publicity and marketing work. In so doing, it is important to avoid giving the impression that racial and cultural diversity will be achieved primarily through financial aid, which might reinforce unhealthy stereotypes.

Today's parents have high expectations for the condition of facilities in the new school. In addition, relations with a Parent Association, however nascent, are a priority for the founding head and board.

It was once the case that many Episcopal school parents were willing to be "pioneers" for a few years and to delay



gratification over the facilities of a young school as long as they were safe and basically useful. In addition to the fact that many municipalities have increased their requirements for temporary units (landscaping and the like), we now find that it is necessary for new programs to make major improvements to interim facilities for use during the construction or remodeling of the permanent site. Parents generally want their children to have “as much as” any of those who will come after them, and this cultural shift will have an impact on the school’s business plan. It is also important that clear guidelines for the mission and work of any Parent Association be established by the Board very early in its life. Informal arrangements for the Parent Association, however generous and well intentioned, if begun in the young school, may encourage a unilateralism that will pose some challenges later on.

Positive references to public education and proactive communication with its leaders are indispensable to the start-up process.

Episcopal schools need to come into being for positive, life-affirming reasons. Our experience in the NAES office shows us that when an exploratory process presents itself as born out of dissatisfaction with the public schools, or other independent schools for that matter, the culture of dissatisfaction

runs the risk of permeating the new school. In all public communications (e.g. publications, presentations, and all conversations) the new Episcopal school’s leadership should speak of an addition to educational options, rather than refer to a choice between those options. Public school officials should be apprised of the exploratory committee’s existence, and possible forms of partnership between public and Episcopal schools should be under consideration at an early stage of the exploratory work. If all members of the community, especially Episcopalians, understand through such efforts that there is a commitment on the new school’s part to support public education, wider support can be gained and misconceptions avoided. ♥

The Rev. Jonathan T. Glass (1957-2004) was, at the time of his death, Associate Executive Director of the National Association of Episcopal Schools. Mr. Glass joined NAES in 1995 as Assistant Director, and subsequently served as Interim Director and Associate Director.

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The Idea of an Episcopal School

Religious Life Committee, Board of Trustees
Oregon Episcopal School, Portland, Oregon

Episcopalians, like all Christians, believe that our life is founded on the life of Jesus, and that as a Church we are called to offer the redeeming love of God in Christ to all people. Episcopal schools are a concrete expression of the Church's care for young people and their families, and of the belief that God calls us to love all God's children.

Despite a long-standing tradition of church schools in the Anglican Communion, the identity of such schools and the nature of their relationships with the Church continue to be re-examined and redefined. The variety of Episcopal schools—ranging from parish day schools that are a direct outgrowth of church mission, to independent boarding schools with only the loosest connections to a diocese—almost defies attempts to define them. The diverse religious backgrounds and cultures of their student and faculty populations raise constant questions of how closely tied they can and should be to the Church, and all Episcopal schools must struggle with the question of what it means to be “Episcopal.” Particular issues may range from qualifications for board and head, to religion curriculum requirements, to participation in school worship.

What Episcopal schools, like other schools, strive for, teach, believe, emphasize and cultivate, must always grow out of present needs and look forward to the demands of the future. But Episcopalians have always treasured their particular traditions, and it may be that the principles embodied in the history of the Church in this country and its roots in England might help clarify the mission of a school that calls itself Episcopal. The points that follow are an attempt to provide not an exhaustive system of such principles but the framework for a discussion and clarification.

An Episcopal school is comprehensive and inclusive.

One of the principles of Anglicanism since Queen Elizabeth I imposed her version of diversity on squabbling Church factions is that there is considerable room inside the Church for differences of practice and even differences of belief so long as there is agreement on the fundamentals. In the Church of England today one finds as broad a range of beliefs and practices as one is likely to find in any national Christian church. This comes partly from the fact that the English Church is a national church, identified with the whole nation



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and the state and therefore expected to see the whole population as under its pastoral care. But even the Episcopal Church has survived differences among its members that would have divided other denominations. Slavery, for example, was a deciding factor in the breakup of several major Protestant denominations into northern and southern branches. No such split occurred in the Episcopal Church. Our church encourages respect for the other person's beliefs. An Episcopal school may be expected not to discriminate on the basis of race, creed, or national origin, and actively seek out faculty and students of diverse backgrounds and traditions in the belief that they bring something to be valued and respected, and because we would like to be broadly inclusive of the community we serve. An Episcopal school will look for the values that unite people rather than those that divide, and not allow factionalism to undermine the life of the whole.

The unity of an Episcopal school is based on rite and tradition rather than doctrine.

Whereas some communions have their official theologians and others have their confessions, Episcopalians have a common liturgical tradition. In the Elizabethan Settlement that established the Church of England, the uniformity imposed was a uniformity of worship rather than doctrine. This is not to say that doctrine is unimportant, but in a Church where

a wide latitude of belief is allowed, it is in worship that we are bound most closely together. It is through our worship that we have had the most influence on the society we live in, as witness the incorporation of Episcopal worship into other denominations and even into secular institutions. If you want to understand what it means to be an Episcopalian, you have to come worship with us.

In an Episcopal school there will likely be no single dogma to which we all subscribe, no list of rules that define who we must be as a community. An Episcopal school ought to be able to point to its own rites and traditions without getting stuck in them, recognizing that these embody the common values of school community. Its rituals may not all derive from *The Book of Common Prayer*, but every member of the community should be able to join in celebrating the life of the community in some ritual ways (rituals can formal or informal). There is at work here too a sacramental principle which we hold dear: God makes sacred the things of this world as they are offered to God in worship. Students should have the opportunity to experience the best of Episcopal worship if they are to understand the heart of the Church's teaching.

An Episcopal school values reason as a way to true understanding.

Anglicanism has always put faith and revelation first, like most Protestants.



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But Anglican theologians have suggested since the 17th century that human reason offers a tool to interpret Scripture and to wrestle with the most difficult spiritual issues. (Again, because there is no human authority to tell us how to think, the responsibility to reason our way to understanding becomes essentially an individual enterprise, in good Protestant fashion, which in turn underlies the idea of respect for individual beliefs.) So, in the Episcopal tradition, learning is important not to find the right answers to be used as weapons against “unbelievers,” but in order to arrive at God’s truth. This suggests that “All truth is God’s truth.” James Russell Lowell once said, “New occasions teach new duties. Time makes ancient good uncouth, they must upward still and onward who would keep abreast of truth.” We believe that the truth will make us free and that God has given us the freedom to seek truth without fearing where it may lead. This suggests that our understanding of truth may grow and change, that God welcomes questions, and that we may subject all our ideas and beliefs to our critical faculties.

Clearly, then, an Episcopal education is not indoctrination, not about enforcing an unquestioning acceptance of a fore-ordained set of doctrines. An Episcopal education should begin from the premise that we (faculty, students, administrators, staff) are all a community of explorers, that we all need to continue to learn and

to grow. It should encourage all students, faculty, and staff to pursue questions wherever they lead, to use their critical faculties, to value the learning and thought we have inherited from the past. It should also, one would think—and here we part company with secular education—refuse to allow students to separate religion and spirituality from the rest of the curriculum, since the Anglican insight is that reason and learning are ultimately intended to serve our exploration of the deepest issues of humankind. An Episcopal education will raise issues of meaning, identity, and ultimate truth that every opportunity in all parts of its program but also will acknowledge the limits of human reason.

An Episcopal school has a concern for the well-being of society.

One of the basic divisions in Protestantism is between those denominations which see the world as hopelessly corrupt and irredeemable, and which, therefore, withdraw from the world, and those which see the hope of redeeming and transforming the world and are therefore involved in it. The Episcopal Church clearly falls into the latter category. Again, the tradition of the Church of England as a state church makes it without question interested in the fate of the society around it.

The Episcopal Church began its life in this country as an established church and has had a hard time, some would argue,



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admitting that it is not. The positive side of this is that despite its essentially conservative nature, the Church has maintained a commitment to be involved in shaping society, a commitment that has been reinforced especially by the Oxford and Anglo-Catholic reform movements and their interest in the impact of industrialization on society. This belief that the Church exists not to rescue people from society but to help transform society has been especially strong in this country since the 1960s, involving the Church in efforts to help racial minorities and the poor, and to work for peace. So this work involves not just private charity but efforts to influence public policy.

This suggests that an Episcopal school should make a concern for society a part of its program. The school will help students to understand that they do not exist apart from society, that society's issues are their issues, and that they are called to respond

to the needs of others. Students will be encouraged not just to share what they have with others but to understand the issues and complexities of society and to consider what their individual and corporate responsibilities are and to take action.

An Episcopal school is founded on love.

This is not a peculiarly Anglican idea but so fundamental to the Christian view that it can be overlooked. Love for students, for their value as children of God, for their unique gifts, must undergird everything we do. We must act out of love, teach love, model love, and love one another in our community above all else, or all else will be meaningless. ♥

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School Exploration and Establishment Process Time Line

The Rev. Jonathan T. Glass

Here is an outline for a school exploration and establishment process using a time frame of roughly 3-4 years. It may well be possible to collapse several steps here if capitalization is intensive and successful, resulting in a time frame of 24-36 months.

Year One, Summer

Committee carries out its investigative work with attention to:

- Student populations needing increased service.
- Other models for Episcopal school ministry.
- Preliminary, confidential overview of potential donor base.
- Development of preliminary budget for full exploration process, with options for funding.
- Preliminary, confidential exploration of site options.

Year One, October

Report from exploratory committee goes to parish or diocesan leaders. Among other items, it contains:

- A well-argued statement that supports or does not support the feasibility of continued exploration requiring accelerated funding.

If the recommendation is to proceed further, then the report will also contain:

- A recommendation for the name of the school.
- A recommendation for the most effective governance model.
- A draft mission statement and a preliminary statement of educational philosophy.
- A proposed 36 month budget for continued exploration and start-up implementation (pre-tuition revenue).
- A time line for implementation, resulting in the opening of the program in 3-4 years. It might be possible to open in 2-3 years if the generosity of the major gifts permit some acceleration. Caution should be exercised.



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Year One, January

Select and retain financial consultant to prepare preliminary capital budget.

Select and retain fund raising consultant for capital feasibility study.

Select and retain architect, accelerate site exploration.

Year One, Winter

Capital campaign feasibility study is conducted.

Year One, Spring-Year Two

Quiet phase of campaign begins; major gifts sought and secured.

Year Two, Fall

Public campaign begins.

Year Two, Winter

Site for school secured.

Year Two, Spring

Consultant selected for search process.

Year Two, Summer

Search process begins for Founding Head of School.

Year Three Winter

Founding Head of School retained.

Year Four, July

Founding Head of School arrives and begins work.

Year Five

School opens.



Some Initial Budget Line Items to Consider When Establishing an Episcopal School

The Rev. Jonathan T. Glass

This is not an exhaustive listing, but is intended as an introductory guide.

Capital Budget

Capital Expenses

Property Purchase, unless donated,
or Lease Fees
Debt Service, if necessary (avoid a mortgage
if possible)
Construction or Renovation
Improvements: painting, etc
Architects and Designers Fees
Playground Equipment and PE supplies
Landscaping
Utilities
Insurance
Other

Personnel Expenses

Founding Head's Salary and Benefits
for 12 months prior to opening
Administrative Support Salary and Benefits
Development Director: may be part-
time, but include if possible
Faculty Recruitment: travel, search
firm registrations, etc.

Miscellaneous/Contingency Expenses

Start-up Expenses

Advertising and Marketing
Consultation Fees: capital campaign,
communications and design branding
Printing
Travel and Entertainment

Library/Media Center Expenses

Books
Computers
Furniture
A/V and Other Equipment

Classroom Expenses

Furniture
Textbooks
Intercom System
Supplies: don't forget the art room!

Office Expenses

Furniture
Computers and Software for databases,
development, business office, registrar
Telephone System
Copier/Fax Machine
Office Supplies
Calculators



Operating Budget

Income

Tuition (reserve some definite percentage for financial aid awards: try to work up to 10% in 4 years or so)

Application Fees

Activity Fees

Fund Raising: keep this low for operating—direct more to capital budgets and endowment

Other

Expenses

Administration Salaries and Benefits

- Head of School
- Administrative Support Staff
- Admissions Officer (may be part-time)
- Development (may be part-time)

Instructional Salaries and Benefits

- Classroom Teachers
- Aides
- After School staff
- Library/Media Specialist
- Art and Music
- Language
- Reading and/or Learning Specialists
- Counselor
- Substitute Teacher Fees

Maintenance Salaries and Benefits

- Facility Manager
- Building and Grounds Crew

Payroll Taxes

Supplies

- Text books
- Consumable Instructional Supplies
- Office Supplies

Utilities

- Phone
- Water
- Gas
- Electricity

Other Expenses

- Professional Development for Faculty and Staff
- Professional Fees
- Travel and Entertainment
- Advertising and Marketing
- Consultation Fees
- Professional Memberships and Dues
- Subscriptions
- Field Trips, Cultural Fees
- Insurance
- Library/Media Center
- Physical Plant
- Postage
- Printing and Copying
- Lease or Rental Fees
- Taxes and Licenses
- Contingency



School Exploratory Committee Questionnaire

Please complete and return this form to the National Association of Episcopal Schools after substantive discussion, reflection and thought has taken place.

(Please type or print your answers)

Name of Exploratory Project _____

Mailing Address _____

Contact Person _____

Role on Committee _____

Today's Date _____

Section One: Background Data

1. Is this program a new School or the expansion of an existing program? *(Circle one)*

2. What grade levels do you envision serving as the school opens?

Three to five years later?

When the process is complete?

3. Anticipated Date of Opening



4. Have you been given a time line/deadline for exploratory work and/or implementation?

Section Two: Background Rationale

5. What are your reasons for starting or expanding this school?

6. Is there a need for this school, and how has this been determined?



7. Who is your proposed constituency?

8. Are there feeder schools in your area?

9. Briefly relate the history of your start up effort.



10. Describe the demographic composition of your community.

11. Describe the current education needs of your community, as you see them.



Section Three: What Type of School Will You Establish?

12. What type of school are you considering? A1 A2 A3 B C D

(Please circle as many models, described below, as you are considering)

A. Parish Day School, which may take any of three forms:

A1: not separately incorporated

The school is operated as an integral part of the parish and does not own any real or personal property. The ultimate control of, and legal responsibility for, the school rest with the rector, wardens, and vestry, who delegate the authority to operate and set policy for the school to the board of trustees.

A2: separately incorporated

The board of trustees is the ultimate authority in these schools, and the parish's interest is represented by vestry and church representatives on the board. In some cases, the physical assets of the school have been secured for the parish, for the protection of its interests, through the school's corporate charter.

A3: separately incorporated, sponsored by more than one parish

These schools have a variety of relationship to their sponsoring bodies. They own their property. In some cases, specified financial contributions, determined by the board, are required from the supporting parishes. The board tends to be strongly Episcopal in its composition, in order to provide representation for the school's multiple sponsors.

B. Cathedral School

Some schools sponsored by cathedrals are structured similarly to parish day schools not separately incorporated, with a diocesan foundation or cathedral chapter having final authority. Others more closely resemble diocesan schools (see above). In any event, authority to set policy and operate the school is delegated to a cathedral school's board of trustees.



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C. Diocesan School

The sponsoring body of these Episcopal schools is the diocese. The link to the diocese may be that the bishop or the bishop's designate is on the board, or that the school's mission is explicitly related to that of the diocese. The land is often owned by the diocese, or the land reverts back to the diocese should the school cease to operate. Each diocese has its own requirements for this type of school.

D. Independent Episcopal School

This category specifically refers to schools which have no sponsoring body in the Episcopal Church. Therefore, following NAES policy, independent Episcopal schools must operate with the knowledge and consent of the diocesan bishop. (Do not confuse this category with that of other separately incorporated Episcopal schools, or with non-Episcopal private schools, which are often referred to as "independent.") Some of these schools are designated as Episcopal schools in their charters, and/or maintain a seat on their boards for the bishop of the diocese in which they are located. The boards and heads of such schools must accept their school's unique need for carefully developed Church relationships and be strongly committed to an ongoing exploration of their Episcopal identity. Board membership should be structured accordingly.

13. What questions do you have about any of these models?



Section Four: Church Sponsorship

14. What relationship does the committee have with a recognized organization of the Episcopal Church — parish, diocese, or other group?

Has your Committee been given official status by a Church body?

How are you held accountable, and to whom do you report?

Have you been given a charge or specific instructions by this body?



Section Five: The Committee's Work

Mission and Structure

15. Do you have a mission statement? If so, include it here.

16. Who is represented on the Committee ?

(Please circle applicable groups and indicate how many from each group currently serve on the Committee)

Parents	_____
Vestry	_____
Rector	_____
Bishop/Diocesan Rep.	_____
Community Leaders	_____
Others <i>(Please specify)</i>	_____

17. Name of Chair/Co-Chairs:



Sub-Committees and their Chairs:

18. How often does the Committee meet?

Budget, Finance, and Advancement

19. Is there a budget for your Committee?



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20. What are the sources for your income? *(Please circle all applicable categories)*

Parish funding

Private contributions

Special grants

Diocesan funds

Other (Please specify)

21. Have you established any goals for budget development and fund raising?

Site Selection

22. Will the school be located in an existing building? If so, where is it located and what sort of work will be needed to adapt these facilities to the school's needs?



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23. Is there a need to purchase land and to construct facilities? If so, how have you begun to address these questions?

Section Six: Progress Report

24. What is working well for your Committee at this point?
What do you feel you have accomplished?



25. What is frustrating? What concerns do you feel need to be resolved as soon as possible? What issues are less pressing, but still need to be addressed?

26. How do you think NAES can be most helpful to you in the next stages of your work?