2011-2012 Annual Report
Mission & Ministry

The National Association of Episcopal Schools (NAES) is an independently incorporated, voluntary membership organization that supports, serves, and advocates for the vital work and ministry of those who serve over 1,200 Episcopal schools, early childhood education programs, and school establishment efforts throughout the Episcopal Church. Chartered in 1965, with historic roots dating to the 1930s, NAES is the only pre-collegiate educational association that is both national in scope and Episcopal in character.

The mission of NAES is to serve those who serve Episcopal schools. Within the Christian tradition of inclusion and open inquiry, NAES:

- **Affirms** the spiritual dimension of learning that values both faith and reason.
- **Creates and nurtures** an extended community of leaders in order to foster partnerships, unity, mutual support and professional growth.
- **Promotes** personal formation through moral, spiritual, intellectual, creative, physical and social development.
- **Assists** Episcopal schools in creating supportive communities through worship, learning, pastoral care and service.
- **Recognizes, appreciates and supports** the diversity within and among Episcopal schools.
- **Helps** schools explore, discover and articulate their visions and ministries as Episcopal schools.

Consonant with our mission and philosophy, we advance Episcopal education, strengthen Episcopal schools, and foster “excellence through association” by providing essential services, resources, conferences, and networking opportunities on

- **Episcopal School Identity** as expressed through school worship; religious studies and formation; service and service-learning; equity and justice; and school life and culture.
- **Leadership and Governance** matters pertaining to church-school relations and governance; leadership transition; school ministry recruitment, training, and deployment; and school establishment, expansion, and planning.
- **Spiritual and Professional Development** of heads of school, chaplains and teachers of religion, rectors, trustees and vestries, administrators, and teachers.
“Excellence Through Association.” It is a concise statement, this new NAES tag line. A simple statement it is not, for it signifies Episcopal schools’ commitment to mission excellence; the mutual support our schools provide one another in pursuit of this excellence; and NAES’ role in nurturing and facilitating this commitment and community of schools. As the head of an Episcopal school for many years, I experience first hand each of these strands of excellence.

The NAES Governing Board and Staff are committed to enhancing and strengthening this third strand of excellence: NAES’ role in serving and supporting our Episcopal schools. With our Strategic Plan 2012 as a road map, we have set out together to review and enhance programmatic offerings and develop new ways of connection to and support for our schools. As you will read in this report, the National Association of Episcopal Schools is moving from strength to strength, financially and programmatically. We are off to a great start in our journey.

NAES is in excellent fiscal health. Having reached in 2010-2011 its goal of establishing a reserve fund, the Governing Board has begun the practice of allocating the Association’s unrestricted net income to support and underwrite programs directly. I am happy to report that 2011-2012 unrestricted net income was allocated to support Biennial Conference 2012 scholarships, membership, and development of our new website, all important avenues of learning, access, and connection in support of excellence.

NAES’ strong fiscal position is important, but only insofar as we use these resources wisely to meet members’ needs, thus insuring the health of Episcopal schools. The activities described in this report embody this commitment to you, our members. We have much to celebrate: the publication of Strategic Plan 2012; the release of Principles of Good Practice for Chapel and Worship in Episcopal Schools; the launch of our new website, social media presence, and logo; the expansion of our webinar series; and successful conferences.

There is also the continuing work of presence, advice, consultation, and advocacy. I want to highlight particularly our work this past year with Episcopal Church leaders regarding lay benefits and pensions in preparation for the church’s General Convention this past July. The connections made and the effective telling of our stories proved invaluable both in the short and long term. They constitute but one more facet of association in support of mission excellence.

Please join me in thanking one particular fellow traveler, Laurie Boone Hogen, who concluded her service on the Governing Board this past June. Laurie is a pillar of the Episcopal school world, and a caring, thoughtful, and faithful advocate for children. We wish her well in her retirement. Bon voyage, Laurie!

Thank you for your support of NAES and to our shared life as Episcopal schools. God bless you in your work and life, and that of your faculty and staff, students, families, and larger communities.
As I reviewed this past year’s initiatives and ongoing programs, school visits, publications, and partnership ventures for this message, I was amazed at what has been accomplished. Yes, we have done much, and there is much of which we can all be proud, but what excites me most is the future: the future of Episcopal schools and NAES. The release of our Strategic Plan 2012 has brought new clarity and direction to our work. It will be the context in which we make decisions about what we do and how we do it. Happily, the goals we have set out for the future coincide with the wide variety of accomplishments of this past year.

Strategic Plan 2012
In the fall of 2012, the Association’s released its Strategic Plan 2012. It envisions a future for NAES and its member schools that honors both the compelling mission of Episcopal schools as well as the freedom they possess to respond to new challenges. In this way, it charts a future characterized by flexibility yet adherence to a core tradition.

To meet the challenges ahead, Strategic Plan 2012 focuses on five principal areas of Episcopal identity:

- Member Value
- Leadership and Governance
- Advocacy with the Wider Church
- Justice and Equity
- Stewardship

This strategic plan was the result of over a year of deliberation and discussion with the Governing Board, as well as a variety of representatives of our member schools and leaders of the Church and the world of education. It reflects both the deep regard so many have for NAES and the role we have played in our schools. For all of those who gave time, attention, and care to the development of this plan, we are most grateful. Hopefully we will be able to honor that confidence in carrying out the vision they have helped to shape.

Principles of Good Practice for Chapel and Worship in Episcopal Schools
Episcopal schools are called to fulfill two simultaneous commitments: to provide students an authentic experience of Christian worship that is unapologetically and identifiably Anglican; and to welcome, affirm, and support the spiritual development of students of all faiths or no faith at all. Building upon the success of the Principles Good Practice series, NAES released the Principles of Good Practice for Chapel and Worship in Episcopal Schools last fall.
Please join me in thanking Ann Mellow, associate director, for her work in crafting this document. Countless individuals were contacted in the process of drafting these principles. We are especially grateful to the many chaplains, rectors, and other school leaders who participated in the conversations that enabled us to create this document. Their feedback and suggestions have been invaluable. These principles are the fruit of our collective efforts and accumulated wisdom.

Advocacy Work in Preparation for General Convention
Throughout 2011-2012, NAES worked with Episcopal Church leaders on their understanding the impact on Episcopal schools of the 2009 General Convention resolutions regarding lay employee benefits. We undertook this advocacy work in preparation for the July 2012 General Convention, where the Rt. Rev. Thomas Breidenthal, bishop of Southern Ohio and NAES Governing Board member, proposed resolutions modifying the implementation of these requirements. The relationships built over the course of the year were crucial to the end results: bishops and Convention deputies spoke passionately and eloquently about the resolutions in hearings and again on the floor of Convention on behalf of the revised final legislation. We succeeded in obtaining a revised, phased implementation calendar for the requirements. Our thanks go to Bishop Breidenthal, Governing Board member Connie Wootton of SAES, and all who worked on this effort. We look forward to building upon these relationships to further the mission and ministry of Episcopal schools.

A Redesigned Website
In April 2012, we launched our redesigned website (www.episcopalschools.org). It enables members, education professionals, Episcopalians, and visitors to lead and serve better the over 1,200 Episcopal schools and early childhood education programs. It is an exciting moment in our communication ministry as we educate, inform, and connect these individuals in order to advance Episcopal education and to promote excellence through association. The new site includes:

- a Library of carefully chosen resources that is front and center on the main navigation bar.
- new Facts & Figures and Episcopal Schools FAQs pages.
- a revamped Career Center with expanded Job Listings and information about Career Paths in Episcopal schools.
- information about Partnership Programs through which Episcopal schools can work with schools in need, including Episcopal schools in Haiti.
- revised search result listings for Find a Member School that feature school descriptions, logos, and photos.
- new lists of Boarding Programs and the Episcopal Urban School Alliance.
- a Donate Online to NAES mechanism.

The site is the creation of Matrix Group International, Inc., a leading web design and development agency in the Washington, DC area, that partners with associations, professional societies, and nonprofits. My thanks go to them, to the entire NAES staff, which worked on the project, and to David Schnabel, communications and events coordinator, who managed and oversaw the project here at NAES.
Social Media PresenceLaunched
NAES now has presences on Facebook (naes.episcopal) and Twitter (@naes_episcopal). You can now follow us for the latest updates on NAES news, conferences, webinars, events, and resources, as well as member school news and links to other organizations’ resources we think you should know. My thanks to Erin Neary, 2011-2012 member services assistant, for creating these pages and managing them throughout the year.

Our New Logo
In conjunction with our website redesign, we undertook a logo redesign with an eye to meeting three goals:

- inclusion of NAES’ full name
- use of the Episcopal Church shield’s blue and red to reinforce the Episcopal identity of the Association and our member schools
- development of a new tag line

The work of DanielsDesignConsultants and Blue Sky Design, Inc., the new logo is a fresh and modern identity for NAES. Again, David Schnabel coordinated the office’s work on the project.

As for NAES’ new tag line, “Excellence Through Association” is meant to communicate:

- the commitment of Episcopal schools to excellence in their chosen educational missions;
- the mutual support Episcopal schools offer one another in pursuit of this commitment; and
- the Association’s role in nurturing and facilitating both the commitment and the community through its programs, services, and resources.

The tag line is drawn from an essay by the Rev. Dr. John Crocker, Sr., headmaster emeritus of Groton School, that appeared in the Directory of Episcopal Church Schools 1972-1973:

> Excellence depends upon association. No important enterprise can flourish without the strength that comes from moral support, from the exchange of ideas, from mutual encouragement and criticism. (“The Episcopal Church in Education”)

While the tag line is new, it deliberately draws upon the rich tradition of the association and the individuals—such as Dr. Crocker—who built this organization into what it is today. Look for the new logo on NAES materials and communications as a sign of our commitment to provide you with outstanding services and resources in support of excellence.

Expanded Webinar Series
Building on the success of the 2010-2011 webinar series, we moved to a series of monthly webinars in 2011-2012 on a wide range of topics, designed for a broad spectrum of school leaders and free to members.

- Episcopal Identity for Administrators New to Episcopal Schools – July 12, 2011
- New Chaplains – August 9, 2011
- A Financial Dashboard for Early Childhood Education Programs – September 13, 2011
- Rectors and Episcopal Schools: It’s a Wonderful Life – October 11, 2011
Our On-going Work
A large part of our work is visiting schools, working with school and church leaders, answering telephone and email inquiries, and providing counsel and a sympathetic ear. We received 137 inquiries from schools, their sponsoring organizations, and dioceses in 2011-2012, compared with 133 inquiries in 2010-2011. A percentage breakdown by types of inquiries looks something like this:

<table>
<thead>
<tr>
<th>Inquiry Type</th>
<th>2011-2012</th>
<th>2010-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Management</td>
<td>32%</td>
<td>25%</td>
</tr>
<tr>
<td>Governance and Church/School Relations</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>School Start-ups and Expansions</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Chapel, Worship &amp; Study of Religion</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Leadership Transitions</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

NAES sponsored or cosponsored a number of professional development conferences in 2011-2012.

- NAES/SAES Newly Appointed Heads Institute – September 29-October 1, 2011
- ChapToR 2012: Fear and Faithfulness—Ministering to Communities in Transition – February 16–18, 2012
- Pacific Northwest Episcopal School Chaplains and Rectors Retreat – February 27–28, 2012
- Building the Future: Philanthropic, Alumni/ae, and Collaborative Relationships at Episcopal Early Childhood Education Programs – April 11, 2012

Through myriad speaking and preaching engagements, and collaboration with other associations, staff members helped to advance the cause of Episcopal education, the mission of the Association, and Episcopal school leaders in making connections and building community. We are glad to have collaborated in 2011-2012 with a variety of allied organizations.

- American Society of Association Executives
- Berkeley Divinity School at Yale
- Center for Spiritual and Ethical Education
- Church Pension Group
- Church Schools in the Diocese of Virginia
- Colleges & Universities of the Anglican Communion
- Council for American Private Education
- Episcopal Camps and Conference Centers
- The Episcopal Church
- Episcopal Church Foundation
Thank You to Our Supporters
The Association’s financial position is strong. Our thanks to all the members, associate members, corporate subscribers, donors, supporters, and volunteers for your gifts of time, talent, and treasure. Your association with NAES truly make a difference in our ability to support and serve Episcopal education.

Governing Board and Staff
We are blessed by the commitment and work of the Association’s Governing Board. At the end of 2011-2012, we bade farewell to Laurie Boone Hogen, who completed her term of service. I am grateful for the wisdom and perspective she offered the Association through her work on the Governing Board and in leading workshops for the early childhood education community. We wish her Godspeed in what I am sure will be a very active retirement.

In 2011-2012 we welcomed Erin Neary to our staff as our member services assistant. Her fine work is a reflection of the mission-driven spirit of the entire staff. Please join me in thanking the NAES staff for its hard work and careful stewardship of these resources this past year. As always, they are dedicated to a standard of excellence and a fruitful association with you. They are constantly exploring new, cost-effective avenues for the delivery of resources and services and I am grateful for the expertise they bring to their work.

As I wrote at the beginning of this message, the life of NAES is full, complex, diverse, and rewarding. We have begun the process of implementing our new strategic plan. We look forward to the programmatic initiatives designed to make the plan a reality over the next few years.

May God bless you all in your life and work.
Outreach Grants & Biennial Scholarships

Each year NAES designates $12,000 or 10% of its budgeted Annual Fund goal, whichever is higher, to be distributed in the form of Outreach Grants to members, associate members and regional, state or diocesan Episcopal schools organizations. These grants support projects commensurate with the mission and philosophy of the Association.

In 2011-2012, the Governing Board designated a portion of the unrestricted net assets at the close of that year to be distributed in the form of Biennial Conference 2012 scholarships. These grants enable schools that might otherwise be unable to do so to attend the Biennial Conference.

Outreach Grants
- Calvary Episcopal School, Bastrop, TX - Support for the school’s tuition assistance program.
- Episcopal Day School of Christ Church Parish, Pensacola, FL - Episcopal Schools Celebration support.
- Grace Montessori School, Allentown, PA - Support for the school’s scholarship fund program.
- St. Anne’s Episcopal School, Middletown, DE - Funding for faculty and staff materials in support of Daily Devotions in homerooms and advisory groups.
- St. George’s Independent Schools, Memphis, TN - Funding for Camp Dragon, a summer camp for disadvantaged urban youth.
- St. James’ Episcopal School, Austin, TX - Capital funds for a play area shade covering.
- St. John’s Northwest Military Academy, Delafield, WI - Support for the school’s “Helping the Least Among Us” service program.
- St. Paul’s Episcopal Montessori School, San Antonio, TX - Support for the school’s scholarship fund.

Biennial Conference 2012 Scholarships
- Calvary Nursery School, Stonington, CT
- The Cherub School, Mechanicsville, VA
- Esperanza Academy, Lawrence, MA
- Grace Episcopal Day School, Massapequa, NY
- St. Benedict’s Episcopal Day School, Smyrna, GA
- St. James’ Episcopal School, Warrenton, VA
- St. Mark’s Episcopal School, Upland, CA
- St. Mary’s Episcopal School, Lakewood, WA
- St. Michael’s Parish Day School, Tucson, AZ
- St. Stephen’s Preschool, Santa Clarita, CA
Members & Associate Members

Thank you to our 2011-2012 members and associate members for their support and participation. Members are schools owned, operated, or sponsored by a parish, cathedral, diocese, religious community, or other recognized Episcopal Church organization; and schools under the jurisdiction or operating as an Episcopal school with the knowledge and consent of the bishop of the dioceses in which they are located. Associate members are Episcopal school start-up committees and schools not Episcopal Church-related but sympathetic to the aims and purposes of the Association. These committees and schools are non-voting associate members.

The Advent Episcopal School, Birmingham, AL
Advent Parish Day School, Tallahassee, FL
All Hallows Episcopal Nursery School, Wyncote, PA
All Saints by-the-Sea Parish School, Santa Barbara, CA
All Saints Cathedral School, Charlotte Amalie, St. Thomas, VI
All Saints Early Learning Center, Jacksonville, FL
All Saints Episcopal Day School, Hoboken, NJ
All Saints Episcopal Day School, Las Vegas, NV
All Saints Episcopal School, Beaumont, TX
All Saints Episcopal School, Tyler, TX
All Saints Preschool, Chevy Chase, MD
All Saints Preschool, Hilton Head, SC
All Saints’ Academy, Winter Haven, FL
All Saints’ Episcopal Day School, Carmel, CA
All Saints’ Episcopal Day School, Phoenix, AZ
All Saints’ Episcopal School, Austin, TX
All Saints’ Episcopal School, Morristown, TN
All Saints’ Episcopal School of Fort Worth, Fort Worth, TX
All Saints’ Preschool, Kapaa, HI
Anna Julia Cooper Episcopal School, Richmond, VA
Annie Wright Schools, Tacoma, WA
Ascension Day School, Clearwater, FL
Ascension Episcopal School, Houston, TX
Ascension Episcopal School, Lafayette, LA
Beaches Episcopal School, Jacksonville Beach, FL
Beauvoir, The National Cathedral Elementary School, Washington, DC
Beginnings/Calvary Episcopal Church, Pittsburgh, PA
Berkeley Preparatory School, Tampa, FL
Bethany School, Cincinnati, OH
Bethlehem School, Lynnfield, MA
The Bishop John T. Walker School for Boys, Washington, DC
Bishop Noland Episcopal Day School, Lake Charles, LA
Bishop Seabury Academy, Lawrence, KS
The Bishop Strachan School, Toronto, ON, Canada
The Bishop’s School, La Jolla, CA
Boys’ Home, Inc., Covington, VA
Breck School, Minneapolis, MN
Brooks School, North Andover, MA
The Butterfly House, Alexandria, VA
Calvary Episcopal School, Bastrop, TX
Calvary Episcopal School, Richmond, TX
Calvary Nursery School, Stoneington, CT
Campbell Hall (Episcopal), North Hollywood, CA
Canterbury School, Greensboro, NC
The Canterbury School of Florida, St. Petersburg, FL
Carillon Preschool, Portola Valley, CA
Casady School, Oklahoma City, OK
The Cathedral House Montessori School, Houston, TX
Cathedral School for Boys, San Francisco, CA
The Cathedral School of St. John the Divine, New York, NY
Chatham Hall, Chatham, VA
The Cherub School, Mechanicsville, VA
A Child’s Garden School, San Gabriel, CA
Children of Grace Preschool, Gainesville, GA
Children’s Garden at The General Theological Seminary, New York, NY
Children’s School of Grace Episcopal Church, Lexington, NC
Christ and Holy Trinity Preschool, Westport, CT
Christ Church Day School, Coronado, CA
Christ Church Day School, Easton, MD
Christ Church Episcopal Preschool, Glen Allen, VA
Christ Church Episcopal Preschool, Lake Oswego, OR
Holy Trinity Episcopal Day School, Glenn Dale, MD
Holy Trinity Episcopal School, Fruitland Park, FL
Holy Trinity School, Richmond Hill, ON, Canada
Hoosac School, Hoosick, NY
Imani Dei Middle School, Tucson, AZ
Iolani School, Honolulu, HI
Jack & Jill School at St. George’s Church, New York, NY
Jardín e Escuela Episcopal Bilingüe Epifanía, San Pedro Sula, Cortés, Honduras
Jardín, Escuela e Instituto Episcopal Bilingüe El Buen Pastor, San Pedro Sula, Cortés, Honduras
Kent School, Kent, CT
Kinder e Escuela Episcopal Santísima Trinidad, La Ceiba, Atlántida, Honduras
Kingsway College School, Toronto, ON, Canada
Lakefield College School, Lakefield, ON, Canada
Linden Tree Preschool at Christ Church, Cobble Hill, Brooklyn, NY
Little Graces Preschool, The Plains, VA
The Little School at St. Martin’s Episcopal Church, Metairie, LA
National Cathedral School, Washington, DC
Oak Hall Episcopal School, Ardmore, OK
Oregon Episcopal School, Portland, OR
Palisades Episcopal School, Charlotte, NC
Palmer Preschool, Houston, TX
Palmer Trinity School, Palmetto Bay, FL
Parish Day School of Eastern Shore Chapel, Virginia Beach, VA
Parish Episcopal School, Dallas, TX
Porter-Gaud School, Charleston, SC
Redeemer Episcopal Academy, Eatonton, GA
Redemption Christian Preschool, Southampton, PA
Resurrection Episcopal Day School, New York, NY
Resurrection Episcopal Preschool, Sautee-Nacoochee, GA
Rock Point School, Burlington, VT
Royal St. George’s College, Toronto, ON, Canada
San Jose Episcopal Day School, Jacksonville, FL
School Start-up Committee, Diocese of Rochester, Rochester, NY
Seabury Hall, Makawao, HI
Shattuck-St. Mary’s School, Faribault, MN
Small Wonders at St. Paul’s, Doylestown, PA
South Kent School, South Kent, CT
St. Aidan’s School, Malibu, CA
St. Albans School, Washington, DC
St. Ambrose Preschool & Daycare, Fort Lauderdale, FL
St. Ambrose/Sea Breeze School, Foster City, CA
St. Andrew’s Episcopal School, Newport News, VA
St. Andrew’s By the Sea Preschool, San Diego, CA
St. Andrew’s Episcopal Academy, Fort Pierce, FL
St. Andrew’s Episcopal Church Preschool, Ben Lomond, CA
St. Andrew’s Episcopal Preschool, Burke, VA
St. Andrew’s Episcopal School, Austin, TX
St. Andrew’s Episcopal School, New Orleans, LA
St. Andrew’s Episcopal School, Potomac, MD
St. Andrew’s Episcopal School, Ridgeland, MS
St. Andrew’s Nursery School & Kindergarten, New Providence, NJ
St. Andrew’s Preschool & Day Care Center, Nogales, AZ
Saint Andrew’s School, Boca Raton, FL
St. Andrew’s School, Middletown, DE
St. Andrew’s School, Richmond, VA
Saint Andrew’s Episcopal School, Saratoga, CA
St. Andrew’s-Sewanee School, Sewanee, TN
St. Anne’s Episcopal School, Middletown, DE
St. Anne’s Day School, Atlanta, GA
St. Anne’s Episcopal Day School, Salem, VA
St. Anne’s Episcopal School, Denver, CO
St. Anne’s School of Annapolis, Annapolis, MD
St. Anselm’s Episcopal Nursery School, Shoreham, NY
St. Augustine’s Episcopal School, Metairie, LA
St. Barnabas Episcopal School, Deland, FL
St. Bartholomew Community Preschool, New York, NY
St. Benedict’s Episcopal Day School, Smyrna, GA
St. Boniface Episcopal School, Comfort, TX
St. Boniface Preschool, Sarasota, FL
St. Catherine’s Episcopal Preschool, Jacksonville, FL
St. Catherine’s School, Richmond, VA
St. Christopher School, Fort Worth, TX
St. Christopher’s by-the-Sea Montessori, Key Biscayne, FL
St. Christopher’s Preschool, Springfield, VA
St. Christopher’s School, Richmond, VA
St. Chrysostom’s Day School, Chicago, IL
St. Clement Episcopal Day School, Alexandria, VA
St. Clement’s School, Honolulu, HI
St. Columba’s Nursery School, Washington, DC
St. David’s Episcopal Day School, Wilmington, DE
St. David’s Episcopal Preschool, Ashburn, VA
St. David’s Episcopal School, San Antonio, TX
St. David’s Episcopal School, Inc., Wellington, FL
St. David’s Preschool, Richmond, VA
St. David’s Preschool, San Diego, CA
Corporate Subscribers

Corporate Subscribers are for-profit and not-for-profit companies and organizations supplying products and professional services to Episcopal schools, early childhood education programs, school exploration committees, and their leaders. While broadening their visibility within the Episcopal school community through a variety of channels, they are able to show their support for the Association and Episcopal schools. Thank you!

Brigham Hill Consultancy, Dallas, TX
Cal/West Educators Placement, Encino, CA
Carney, Sandoe & Associates, Boston, MA
Center for Spiritual and Ethical Education, Portland, OR
Church Pension Group, New York, NY
Educators’ Collaborative, L.L.C., Meriden, NH
FACTS Management Company, Lincoln, NE

Great Hill, LLC, Marion, MA
Independent School Management, Wilmington, DE
Marine Lab/Marine Resources Development Foundation, Key Largo, FL
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The Rev. Lisa Barrowclough, D.Min.
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Laurie Bottiger, Ph.D.
Mr. John Brumbaugh, in honor of Sean Murphy and Laura Walker
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The Church of the Epiphany, New York, NY - The Rev. Jennifer R. Limman
Church of the Transfiguration, Dallas, TX - The Rev. Jerry D. Godwin
Mr. George P. Davison
Doane Stuart School, Rensselaer, NY - Richard D. Enemark, Ph.D., in honor of the Rev. Daniel R. Heischman D.D.
The Rev. Henry L. Doyle
The Episcopal Diocese of San Diego, San Diego, CA - The Rt. Rev. James R. Mathes
The Episcopal Diocese of Southwest Florida, Parrish, FL - The Rt. Rev. Dabney T. Smith, D.Min.
James A. Freeman, Ph.D.
Mrs. Katherine Gahagan
Good Shepherd Episcopal School, Austin, TX - Ms. Jeanie Stark
Mrs. Elizabeth B. Hogen
Holy Innocents’ Episcopal Church, Atlanta, GA - The Rev. Canon Michael R. Sullivan, in honor of Holy Innocents’ Episcopal School
The Rev. F. Washington Jarvis III
Mr. Burns Jones, in honor of The Rev. Daniel R. Heischman, D.D.
Elizabeth I. Legenhausen, Ed.D.
Ms. Ann Mellow & Mr. Peter Helling
Mary & Victor Menacho
The Rev. Louis Oats, D.Min.
Mrs. Joan G. Ogilvy Holden
Mr. T. Edmund Rast
The Rev. Michael & Mrs. Frances Robinson
The Rev. Charles & Mrs. Suzanne Rowins
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All Saints’ Episcopal Day School, Carmel, CA - Ms. Michele Rench
Ms. Elizabeth L. Barnes
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Mr. David & Mrs. Suejette Brown
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The Rev. Charles E. Connelly
Mr. Joel L. Cunningham
Mr. Robert L. Cunningham
Mr. Robert Davis, Jr. & Ms. Alice Yurke
The Episcopal Academy, Newtown Square, PA - The Rev. James R. Squire
The Episcopal Diocese of Oklahoma, Oklahoma City, OK - Ms. Laura Gallagher
The Episcopal Diocese of Rochester, Rochester, NY - The Rt. Rev. Prince G. Singh Ph.D.
The Episcopal Diocese of Texas, Austin, TX - The Rt. Rev. Dena A. Harrison
Episcopal School of Dallas, Dallas, TX - The Rev. Stephen B. Swann
The Rev. & Mrs. Todd R. FitzGerald, in honor of the Rev. George E. Andrews II
Florida Council of Independent Schools, Tampa, FL - Barbara H. Hodges, Ed.D.
The Rev. Canon Carlson Gerdau
The Gooden School, Sierra Madre, CA - Ms. Patricia Patano
Mrs. Ann Gordon, in honor of the Rev. Canon David R. Forbes
Grace Episcopal School, Alexandria, VA - Ms. Chris Stegmaier Bymes
Mrs. Louise C. Hardage
The Rt. Rev. Dena A. Harrison
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Holy Comforter Episcopal School, Inc., Tallahassee, FL - Mr. Peter Kekamp
The Rev. Norman Hull & Mrs. Susan Bade Hull
The Rev. Brooks F. Hundley
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The Rev. James B. Lemler, D.Min.
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Dr. & Mrs. Donald J. Lineback
The Rt. Rev. James B. Magnes, D.Min.
Mrs. Catherine M. Miller, in honor of Mrs. Lucy C. Nazro
David & Mollie Monaco
The Rev. Sally M. Monastiere
The Rt. Rev. James W. Montgomery
Ms. Margaret D. Moore, in honor of the Rev. Peter G. Cheney
Mr. George M. & Mrs. Christine C.H. Plews, in honor of the Rev. Peter G. Cheney
The Rev. Canon & Mrs. Gregory Richards, in honor of the Rev. Daniel R. Heischman D.D.
Mrs. Nancy J. Roberts, in honor of Christ Church Day School
Ms. Aimee Roche
Marianne V. Ryan, D.Min.
Saint Andrew’s Episcopal School, Saratoga, CA - Mr. Harry V. McKay Jr.
Terrie & Kevin Scheckelhoff
Mr. and Mrs. Frank C. Schell, Jr.
Mrs. Jane W. Sellers
Mrs. Charles W. Shreiner Jr., in memory of Dr. Charles W. Shreiner, Jr.
Mr. Andrew K. Smith, in memory of the Rev. Keith W. Butler
The Rev. Nathan S. Speck-Ewer
St. Andrew’s Episcopal School, Potomac, MD - Mr. Robert F. Kosasky
St. George Episcopal School, San Antonio, TX - Mr. Robert G. Devlin, Jr.
St. George’s Kindergarten & Mothers Day Out, Nashville, TN - Ms. Zee Pendleton
St. George’s School, Middletown, RI - Mr. Eric F. Peterson
St. John’s Episcopal Church, Tampa, FL - The Rev. Douglas E. Remer
St. John’s Episcopal Parish Day School, Tampa, FL - Mr. Gordon R. Rode
St. Mark’s Episcopal School, Downey, CA - Ms. Glenda Roberts, in honor of Ms. Mary Lou Pratt
St. Mary’s Episcopal Day School, Tampa, FL - Mr. Scott D. Laird, in honor of the Rev. Daniel R. Heischman, D.D.
St. Stephen’s Episcopal Church, Durham, NC - The Rev. Robert K. Kaynor
St. Thomas Episcopal Church, Coral Gables, FL - The Rev. Mario E. Milian
St. Thomas’s Day School, New Haven, CT - Mr. Fred Acquavita
The Rev. Barbara Talcott
The Rev. Jesse L. Vaughan
Mr. Thomas R. Von Der Ahe, Sr., in honor of The Rev. Canon Julian P. Bull
John & Laura Warren, in honor of the Rev. Barbara Talcott
Ms. Susan Whitten, in honor of Mrs. Marlene R. Shaw
Wooster School, Danbury, CT - Mr. Timothy B. Golding
Mr. Stuart Work
The Rev. Luther Zeigler, in honor of Ms. Joanne Beach

Friends ($50 - $99)
Mr. Henry P. Briggs, Jr.
The Rev. A. Dean Calcote
Christ Church Episcopal Preschool, Ponte Vedra Beach, FL - Ms. Janet Blacker
The Rev. Canon Clinton Dugger
The Rev. Richard E. Greenleaf, in honor of Malcolm Greenleaf
The Rev. Charles R. Henery, Th.D.
Mrs. Carol G. Hjortsberg, in honor of Ms. Jane M. Wood
The Rev. Ralph F. Howe, Jr., in honor of Mrs. Connie R. Wootton

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The Rev. Ralph F. Howe, Jr., in honor of Mrs. Connie R. Wootton

Ms. Kerin S. Hughes, in honor of Palisades Episcopal School
The Rt. Rev. Sam B. Hulsey
Mr. Robert E. Kirkpatrick, in honor of the Rev. P. Roger Bowen
Mr. Michael J. Maruca
The Rev. John E. Merchant
Oak Hall Episcopal School, Ardmore, OK - Ms. Laura Gallagher
Dr. and Mrs. Allen L. Oshana
Nicole P. Passeggio, Ph.D.
Mr. Court Ramsay
Capt. James K. Rumrill
St. Elizabeth’s School, Denver, CO - Mr. Walter T. McCoy
St. Mark’s Episcopal School, Palm Beach Gardens, FL - Ms. Kay A. Carnes
St. Mark’s Preschool, Glen Ellyn, IL - Ms. Megan Kaplan
St. Michael and All Angels Episcopal Church, Tucson, AZ - The Rev. John R. Smith Jr., in honor of Susan & Barry Bedrick
St. Michael’s Episcopal School, Bryan, TX - Kathryn M. Lucchese Ph.D., in honor of Ms. Helen Spencer

Donors
The Rev. Rosemary Beales
Mrs. Nancy T. Clausey
The Rev. Edward Stone Gleason
The Rev. K. Michael Harmuth
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Mr. Peter D. Sanders
St. Michael’s Episcopal Day School, Gainesville, FL - Ms. Kelly Pence
Mrs. Raven G. Tarpley, in honor of Anne T. Weston, Ph.D.
Endowment Fund for Leadership Development

Created in 2008, the NAES Endowment Fund for Leadership Development will help ensure that NAES has the resources to offer leadership development programs and resources for current and future Episcopal school leaders. As a true endowment, it will allow individuals, corporations, and foundations to offer their support, secure in the knowledge that the Association will administer such gifts in a manner faithful to its mission and the wishes of the donor.

**Sustaining Friends ($250 - $499)**
The Rev. Henry L. Doyle

**Supporting Friends ($100 - $249)**

The Rev. Jonathan T. Glass Memorial Fund

This fund, established after the August 2004 death of the Rev. Jonathan T. Glass, NAES’ then Associate Executive Director, honors his life and ministry and is intended, over time, to build an endowment to underwrite new consulting and conference initiatives in areas where his passion and excellence made such a significant impact on so many Episcopal schools and their leaders.

**Donors**
The Rev. Todd R. FitzGerald
Established in 2009-2010, the Muhlenberg Society honors those NAES supporters who have taken the special step of including the Association in their long-term plans through a bequest or other type of planned gift. The society is named for William Augustus Muhlenberg, who is widely regarded as the father of the Episcopal Church schools movement.

The Rev. George E. Andrews II  
Mr. Barry Bedrick  
Mrs. Susan Bedrick  
Mrs. Merrily Dunlap  
The Rev. Daniel R. Heischman, D.D.

The Rev. James E. Hamner IV, D.Phil.  
Mrs. Carol G. Hjortsberg  
Mrs. Judith W. Lineback, Esq.  
Ms. Karan A. Merry  
Doreen S. Oleson, Ed.D.

The Rev. Walter L. Prehn III, Ph.D.  
Marianne V. Ryan, D.Min.  
The Rev. Edmund K. Sherrill II  
Mrs. Laura C. Walker

William Augustus Muhlenberg
Other Gifts of Support

NAES thanks these individuals and organizations for their gifts of time, talent, facilities, services, products, or money in support of specific programs or general operations in 2011-2012.

Building the Future: Philanthropic, Alumni/ae, and Collaborative Relationships at Episcopal Early Childhood Education Programs
Mrs. Mary Ellen Christy
Mrs. Elizabeth B. Hogen
Virginia Theological Seminary, Alexandria, VA

ChapToR 2012: Fear and Faithfulness—Ministering to Communities in Transition
Scott Bader-Saye, Ph.D.
Center for Spiritual and Ethical Education, Portland, OR
Mr. David Streight

Facilities, Utilities, and Other Services
The Episcopal Church, New York, NY

Governing Board Meetings
Monica M. Gillespie, Ph.D.
Mrs. Elizabeth B. Hogen
Doreen S. Oleson, Ed.D.
Resurrection Episcopal Day School, New York, NY
Saint Mark’s Episcopal School, Altadena, CA
St. Paul’s School, Brooklandville, MD
St. Paul’s School for Girls, Brooklandville, MD

NAES/SAES Newly Appointed Heads Institute
Mr. Leo P. Dressel
Mr. Richard C. Kellogg, Jr.
Ms. Aimée Claire Roche
Southwestern Association of Episcopal Schools, Canyon, TX
Mrs. Connie R. Wootton

Webinars
The Rev. Canon Julian P. Bull
Christopher R. Carter, D.Min.
The Rev. Peter G. Cheney
The Rev. D. Corbet Clarke, D.Min.
Mr. Richard C. Kellogg, Jr.
The Rev. Kristen C. Kopren
Marianne V. Ryan, D.Min.

NAES thanks these individuals and organizations for their gifts of time, talent, facilities, services, products, or money in support of specific programs or general operations in 2011-2012.
Governing Board Treasurer’s Message

The Rev. Michael E. Spencer

The 2011-12 year was a very successful one for the National Association of Episcopal Schools. Budgeted income goals were exceeded while keeping expenses under budget, without any sacrifice of programs or services offered.

Actual income exceeded budgeted income, most notably in the Association’s Annual Fund. Thank you to all who gave most generously last year.

With careful oversight of Association resources, NAES staff appropriately managed program, administration, and advancement expenses, bringing these well under budget while fulfilling every mandate and obligation to membership.

In 2010-2011, NAES reached its goal, set by the Governing Board in 2000, to establish a reserve fund equal to one year’s operating expenses, or approximately $1,000,000. With the reserve fund now at its targeted level, the NAES Governing Board has begun the practice of allocating the Association’s unrestricted net income to support and underwrite NAES programs directly. 2011-2012 unrestricted net income was allocated to support Biennial Conference 2012 scholarships, membership, and development of the Association’s new website.

NAES ended the 2011-2012 year with a net deficit of $35,005, compared to a budgeted net deficit of $97,091.

In July 2012, an independent audit of the Association’s finances was conducted by Sobel and Company of Livingston, NJ. There were no abnormalities, weaknesses, or deficiencies to report, and the auditors issued an unqualified opinion with no management letter.

NAES is a vital resource for Episcopal schools working to meet the needs and aspirations of its members. Thank you for your continuing support of one another. With your continued membership and support of its programs, the financial health and service of the Association will remain strong. Together, we look towards the 50th Anniversary of NAES in 2014-2015.

Again, thank you for your support.
## Statements of Financial Position

For the years ended June 30, 2012 and 2011

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash equivalents</td>
<td>$343,737</td>
<td>$376,830</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>$8,122</td>
<td>$6,484</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>$24,201</td>
<td>$16,299</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td><strong>$376,060</strong></td>
<td><strong>$399,613</strong></td>
</tr>
<tr>
<td><strong>PROPERTY AND EQUIPMENT, NET</strong></td>
<td><strong>$43,813</strong></td>
<td><strong>$2,322</strong></td>
</tr>
<tr>
<td><strong>OTHER ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash designated for long term purposes</td>
<td>$70,261</td>
<td>$36,287</td>
</tr>
<tr>
<td>Investments in marketable securities</td>
<td>$1,114,606</td>
<td>$1,166,454</td>
</tr>
<tr>
<td>Investment in deferred annuity contract</td>
<td>$60,876</td>
<td>$59,668</td>
</tr>
<tr>
<td><strong>Total Other Assets</strong></td>
<td><strong>$1,245,743</strong></td>
<td><strong>$1,262,409</strong></td>
</tr>
<tr>
<td><strong>LIABILITIES AND NET ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CURRENT LIABILITIES:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable</td>
<td>$39,346</td>
<td>$19,286</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>$23,244</td>
<td>$15,008</td>
</tr>
<tr>
<td>Post retirement benefits</td>
<td>$1,716</td>
<td>$13,160</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>$211,736</td>
<td>$192,311</td>
</tr>
<tr>
<td><strong>Total Current Liabilities</strong></td>
<td><strong>$276,042</strong></td>
<td><strong>$239,765</strong></td>
</tr>
<tr>
<td><strong>COMMITMENTS AND CONTINGENCIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NET ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>$1,356,430</td>
<td>$1,392,095</td>
</tr>
<tr>
<td>Temporarily restricted assets</td>
<td>$3,402</td>
<td>$3,092</td>
</tr>
<tr>
<td>Permanently restricted assets</td>
<td>$29,742</td>
<td>$29,392</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$1,389,574</strong></td>
<td><strong>$1,424,579</strong></td>
</tr>
<tr>
<td><strong>2011-2012 Governing Board</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governing Board Treasurer’s Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statements of Financial Position</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statements of Activities &amp; Changes in Net Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statements of Cash Flows</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011-2012 Governing Board</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011-2012 Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Statements of Activities & Changes in Net Assets

For the years ended June 30,

<table>
<thead>
<tr>
<th>Revenues, Gains, and Other Support</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership and other subscriber dues</td>
<td>$876,977</td>
<td>$853,625</td>
</tr>
<tr>
<td>Grants and gifts</td>
<td>$1,780</td>
<td>$200,500</td>
</tr>
<tr>
<td>Consulting, publications, honoraria</td>
<td>$16,498</td>
<td>$22,696</td>
</tr>
<tr>
<td>Contributions</td>
<td>$115,865</td>
<td>$95,480</td>
</tr>
<tr>
<td>Strachan Fund</td>
<td>$16,914</td>
<td>$16,992</td>
</tr>
<tr>
<td>Donated building services</td>
<td>$114,682</td>
<td>$114,324</td>
</tr>
<tr>
<td>Conferences</td>
<td>$10,659</td>
<td>$5,965</td>
</tr>
<tr>
<td>Biennial Conference</td>
<td>-</td>
<td>$292,690</td>
</tr>
<tr>
<td>Investment income</td>
<td>$33,374</td>
<td>$31,050</td>
</tr>
<tr>
<td>Net realized gains and unrealized (loss) gains on investments</td>
<td>($11,313)</td>
<td>$44,727</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$7,091</td>
<td>$7,318</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>$1,182,527</td>
<td>$1,685,367</td>
</tr>
<tr>
<td>Net assets released from donor and grantor restrictions</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total Revenues, Gains, and Other Support</td>
<td>$1,182,527</td>
<td>$1,685,367</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td>$795,118</td>
<td>$964,268</td>
</tr>
<tr>
<td>Communications and website development</td>
<td>$220,257</td>
<td>$123,976</td>
</tr>
<tr>
<td>Advancement</td>
<td>$99,951</td>
<td>$148,030</td>
</tr>
<tr>
<td>General and administrative</td>
<td>$102,206</td>
<td>$64,700</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$1,217,532</td>
<td>$1,300,974</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(DECREASE) INCREASE IN NET ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Assets, Beginning of year</td>
<td>$1,424,579</td>
<td>$1,040,186</td>
</tr>
<tr>
<td>Net Assets, End of year</td>
<td>$1,389,574</td>
<td>$1,424,579</td>
</tr>
</tbody>
</table>
### Statements of Cash Flows

For the years ended June 30, 2012 and 2011

#### CASH FLOWS PROVIDED BY (USED FOR):

**OPERATING ACTIVITIES:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Decrease) increase in net assets</td>
<td>($35,005)</td>
<td>$384,393</td>
</tr>
<tr>
<td>Adjustments to reconcile (decrease) increase in net assets to net cash provided by operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>$6,412</td>
<td>$3,951</td>
</tr>
<tr>
<td>Unrealized gain (loss) on investments</td>
<td>$11,313</td>
<td>($50,806)</td>
</tr>
<tr>
<td>Realized loss on investments</td>
<td>-</td>
<td>$6,079</td>
</tr>
<tr>
<td>Changes in certain assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>($1,638)</td>
<td>$2,381</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>($7,902)</td>
<td>$2,670</td>
</tr>
<tr>
<td>Other assets</td>
<td>($1,208)</td>
<td>($1,319)</td>
</tr>
<tr>
<td>Accounts payable</td>
<td>$20,062</td>
<td>$4,129</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>$8,236</td>
<td>($2,132)</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>$19,425</td>
<td>($55,198)</td>
</tr>
<tr>
<td>Post-retirement benefits</td>
<td>($11,444)</td>
<td>($12,132)</td>
</tr>
<tr>
<td><strong>Net Cash Provided by Operating Activities</strong></td>
<td>$8,251</td>
<td>$282,016</td>
</tr>
</tbody>
</table>

#### INVESTING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceeds from sale of investments</td>
<td>$40,535</td>
<td>$69,223</td>
</tr>
<tr>
<td>Purchase of investments</td>
<td>-</td>
<td>($402,418)</td>
</tr>
<tr>
<td>Purchases of property and equipment</td>
<td>($47,905)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Net Cash Used for Investing Activities</strong></td>
<td>($7,370)</td>
<td>($333,195)</td>
</tr>
</tbody>
</table>

#### FINANCING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash designated for long-term purposes</td>
<td>($33,974)</td>
<td>$4,472</td>
</tr>
</tbody>
</table>

**NET DECREASE IN CASH AND CASH EQUIVALENTS**

<table>
<thead>
<tr>
<th>Description</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>($33,093)</td>
<td>($46,707)</td>
</tr>
</tbody>
</table>

**CASH AND CASH EQUIVALENTS:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
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<tr>
<td>Beginning of year</td>
<td>$376,830</td>
<td>$423,537</td>
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<tr>
<td>End of year</td>
<td>$334,737</td>
<td>$376,830</td>
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A complete copy of the Association’s audited financial statements, including all notes, is available by contacting the NAES office.
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The Rev. Daniel R. Heischman, D.D.  
National Association of Episcopal Schools  
New York, NY

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Ms. Ann Mellow
Associate Director

Ms. Linda A. Glad, CAE, CMP
Director of Operations

Mr. David J. Schnabel, CAE
Communications & Events Coordinator

Ms. Erin J. Neary
Member Services Assistant

2011-2012 Staff

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Ms. Erin J. Neary
Member Services Assistant

In compiling this report, every effort has been made to ensure its accuracy. Please report any errors to the NAES office and accept our apologies.