

Thank you. Thank you, Sarah, David, and Katie. Thank you to all of you here.

I feel humbled – and I feel warmed to be at home with friends, even though I find myself unexpectedly in Chicago in February, of all months.

I am filled with wonder.

As I listen to the words spoken tonight, and as I have often thought over the last two months, I feel as though I have been looking into a deep lake, seeing the meaning others have made of my life, reflecting about myself, not, I hope, like Narcissus, but rather understanding better my journey and the purpose of my life.

My mind has been filled by the faces of countless companions over all of those years and by memories of those who have taught me and enriched me.

I believe that the honor you have given me is a reflection of your selves, of your dreams, of your own journey and your purpose.

My hope tonight is to hold up a mirror for you, and through the themes I weave and images I make, for you to see, and perhaps enhance, the meaning of your own lives.

We believe we are faced today with an incredible, uncertain challenge. You have gathered here this week because the purpose of NBOA's conference addresses that challenge.

We know that our schools depend, more than ever before, on the view and skills of financial officers. We are recognized to be vital assets to help our schools survive – and thrive.

Just a month ago, a man from Chicago, in another setting, spoke these words:

“Our challenges may be new, the instruments with which we meet them may be new, but those values upon which our success depends, honesty and hard work, courage and fair play, tolerance and curiosity – these things are old. These things are true. They have been the quiet force of progress throughout our history.

So let us remember who we are and how far we have travelled. Let it said by our children's children that we refused to let this journey end, that we did not turn back, and that we carried forth that great gift of freedom and delivered it safely to future generations.”

Barack Hussein Obama's election represents a significant milestone in the history of humankind for a myriad of reasons. For us, its meaning can be one of inclusion – of recognition that those who once were excluded now can be valued for the good that they can do. Personally, as someone who has often felt like an “other”, I choose to see this milestone as a symbol of hope.

Business officers of independent schools, we all know, have not always felt included.

In my journey that has long been clear, starting when I experienced our role transition from bookkeeper to financial officer. Barbara Swanson knows precisely what I mean. When I joined the Business Affairs Council, our state Association did not include a business officer on the visiting committees for the decennial accreditation process of schools; only in the late '80's after some schools went belly-up after having been accredited, did NY realize what they needed to do. I gather that even today some associations fail to see the wisdom of doing so.

We felt devalued or marginalized, not respected, and to reference a recent NBOA listserv exchange, often lost in a jungle (one that is sometimes populated by dogs, iguanas, geese, bears, and mountain lions, let alone faculty, parents, board members, and governmental regulators).

Also recently noted on our listserve, we question why anyone might wish to purchase at a school auction the opportunity to be “business officer of the day”.

How many of you here are business officers? How many of you have always worked in schools? How many of you worked in profits prior to working in schools?

How many of you prefer to work in a school?

I have asked this question on many occasions before – and I inevitably find that, despite our human tendency to dwell on our difficulties, the joy of working in a setting that serves a noble cause can outweigh all that may drag us down.

Many of you have heard me say, teachers often push back when I tell them that schools are a business. You also know I add: the business of schools is education. We are not here to just make a profit, we are here to serve a greater purpose.

Jim Kirkpatrick talked in Denver a few years ago about the values he had learned from his grandmother. Those comments resonated with many of us because it reminded us of the forces that shaped our selves.

My father was one of my greatest teachers. He devoted his life to a career in the military, not because he loved to fight or wanted to die for his country, but rather to serve others so that freedom and democracy could endure.

My mother, now almost 87, taught me other lessons. Perhaps the greatest was that we have within us the ability to choose how to write the story of our life. Faced with poverty after the death of her father when she was nine, faced with a diagnosis of disease early in her twenties, my mother refused to be consumed by pain and suffering. Not many years ago, she demonstrated that refusal by deciding to write about her own journey in what she came to call her Book of Good Things.

You, too, have that ability.

My parents were examples of the American dream. Although neither graduated from high school, all of their children became college graduates. It was not until I was a scholarship boy at university, and first met students who had attended private schools, that I began to understand issues of classism, another example of my sensing myself as an “other”.

The values my parents instilled in me initially led me to plan a life of public service, though at that early age, I thought to do so meant to achieve position, rather than to adhere to purpose.

My journey to that deeper understanding came in stages.

I had never intended to become a business officer or to work in schools. Both of those happened in totally unplanned ways.

I became a teacher because of Nixon’s policy to “Vietnamize” the war, perhaps my first example of “rightsizing”.

In 1969, following graduation and after nearing the end of a summer job, I received a letter from the Navy informing me that my class to enter OCS had been postponed from October to the following July. I did not know what to do.

I had deferred my entry into law school until after my military service was over and did not believe it was wise to study for one year and then leave for four or more. One of my classmates from college, who worked with me, said: “You like to tell people what to do. Why don’t you teach?”

Answering an ad in the NY Times, I was offered a job at a boarding school in upstate NY.

Something magical happened. As I began to learn how to become an educator, I found an enormous contentment in the wonder of seeing the light go off in a student's mind. I learned that I had some ability to help others find the energy within themselves to flip the switch on. It wasn't about me; it was about them.

In 1970, I started to teach at Allen-Stevenson. By then I had come to understand more clearly that as an "other", my adolescent dreams were likely to be dashed, but now I had a new, greater sense of purpose.

Two years later, I met my partner of nearly 4 decades, Dario, my greatest joy. After his retirement 10 years ago, we finally had the opportunity for me to introduce him to my own professional colleagues and friends, coming out as a gay family. That had been absolutely impossible at the start of my journey – and even not so long ago. Dario has influenced me profoundly.

In the early '80's, the Headmaster and the Treasurer of the Board asked me to become the Financial Officer. I accepted because I felt there was no better way to understand the breadth of the institution, to truly learn how to serve independent schools to fulfill their mission to serve children.

I love independent schools; I believe their existence promotes hope. Yet, as we all know, their continued existence can be fragile.

The ability of independent schools to be independent has been constantly challenged. Daniel Webster defended Dartmouth from New Hampshire's attempt to control it in 1816. In his remarks to the court, he called it "a small school, but there are those who love it." The Supreme Court upheld Dartmouth's right to exist in perpetuity. Again in the 1920's, courts protected independent schools in *Pierce vs. the Society of Sisters*, affirming the right of parents to choose the educational setting for their children. In a landmark NY State decision in 1945, *Packer Collegiate Institute vs. the University of the State of NY*, the ruling denied the commissioner of education the ability to regulate the freedom of action of independent schools.

Why is this lesson in law important? It is important because these bedrock cases grant us the rights to be free to act, free to think, free to learn, free to be different, free to resist the corrosive imposition of bureaucratic uniformity, which can only stultify and lead us as a people to wither and die, rather than to adapt to changing circumstances and new wisdom.

With this freedom, independent schools can have the confidence that they are built to last – that they can keep their eye on the future. In the thoughts of Jim Collins, this is our hedgehog. This permits us both to preserve our core and also to dream of big hairy audacious goals. To hold to core values that never change, yet flourish by adopting generative strategies to meet challenges such as the ones we currently face.

The creation and history of the National Business Officers Association is a premier example.

Faced by the frustrations we experienced in the state and national associations of independent schools, we banded as one, knowing that together the sum would be greater than its parts. A number of you have heard me comment that there is nothing more powerful than a new revelation anchored to an established truth. The growth and success of NBOA demonstrates that concept.

For more than 20 years, I have been learning about how an Association such as ours can have a vital role in delivering a great gift safely to future generations.

Recently Jim Martin, honored with this award in 2000, wrote an email (which in no small part was made possible by the efforts of Paul Ibsen).

Jim wrote:

“I remember my first invitation in 1968 to join a fellow business officer to attend a Midwest conference. I went and received one of the best introductions to what is behind the "business" management of private schools. After two and a half days of listening and asking questions of them (I was the only person under the age of 60!) I asked one last question: "How can I possibly repay you folks for what you have shared?" They replied: "Jim, if you will do what we have done for you by sharing with others, you will have repaid us." Jim ended, "I never forgot that and hope I was able to do so.”

Seeing Jim’s email, I wrote back:

“I remember one of my very first meetings with a group of NYC business officers in the 1980's when you were speaking. Your description of the feelings you had in that Midwest conference mirrored mine as I listened, Jim, to you then.”

Stories often reveal deep truths, providing concrete examples of abstract concepts. The word “mentor”, for instance, stems from the name of a mythical character in the Odyssey. Mentor is given the charge to advise Telemachus, the son of Odysseus when Odysseus departs. The name is an agent noun of “mentos”, which may be defined as “intent, purpose, spirit, or passion”, derived, in turn, from the Indo-Aryan, as in the Sanskrit, “man- tar”, one who thinks.

Jim was not my only mentor; there are far too many to mention all by name. But they all had a common goal: to professionalize our profession. They engaged constantly in the practice of asking and helping others. They found ways to respond to new challenges innovatively. Almost 20 years ago, the Business Affairs Council in NY State, with Taube Import in the lead, tried to create a listserv. Today, the NBOA listserv is a transformative example of uploading new ideas to all – as well as an opportunity to have psychic therapy.

Each of us in this room is quite aware of the vast array of our missions and through our differences, through our federated nature, come to benefit by our inclusion of all those variations.

In learning about a school I have never known before, I have often heard this description: “It is a jewel of a school”. The light refracts through each gem uniquely and provides a gleam that reveals a new way of being.

Although impressive, the crown jewels of England pale beside our living examples, for we are about people.

As individuals we come and we go, but collectively our spirit can endure.

Generations from now, we each will be lost in the mists of time, but our souls will still have the power to inspire others.

I never knew Ken White, but I have met many who did. Recently, at last November’s IAFM, I had the great pleasure of meeting a person who once worked with Ken. Ann-Marie told me a number of stories that obviously brought her great joy in recollecting. In January, I asked her to put some of them in print, because I wanted to share them with you.

Here are a few things she wrote. As I read them, you will understand my wonder about seeing the great depth of my lake.

Please try to connect her words with the themes I have used this evening and look into the mirror I am trying to hold.

After explaining how she came to be appointed to a faculty committee that worked with Ken, Ann-Marie described what she experienced:

“Our rather interesting friendship and mentor/mentee relationship started in year two of my tenure at The Westminster Schools.

Our first meeting was called and I finally found his office in the bowels of Pressley Hall. Ken and I began discussing all aspects of the school business but specifically how extras could be added to the faculty compensation package at a nominal cost. That began the many hours I had the privilege of spending with Ken White and learning of the general financial and business strategies he employed to run an institution in a creative and conservative fashion.

Ken had an amazing entrepreneurial spirit and a “trial and error” style to managing. I saw in Ken a fascinating experimental approach.

Ken talked to me of always having the school’s money in many different places – just in case. He once said with a wink to accompany his disclosure, “we have money in bonds, in stocks, in banks, and if you wanted I can show you the gems I have in a safety deposit box – just in case some money is not worth the paper it is printed on.” Rubies and emeralds I think he said.

“MISBO was born, one of his proudest moments – but I remember the hours and hours he put into that idea.

Good Food and refreshment a necessity he always said and never scrimped on a faculty dinner!

He created a culture of carefulness, and if you got to know him, a joy in every minute of doing so. He liked the game of saving money, but all for the good of educating children and keeping faculty well cared for.

If you ever heard his heartfelt chuckle or saw the corner of his smile lift, you knew he loved what he did, and the world of Independent Schools was all the better for his careful and creative quirky way of doing the business of school.”

“What did I learn from Ken?” Ann-Marie concluded.

“Keep the boat steadily on course, but have a plan for a few side trips that just might add to the value of the journey. The quality of business management is in the details so that you can get to the big picture. Don’t isolate any aspect of the school workings – if someone is interested – share! Enjoy every aspect of school work – nothing is a necessary evil - only an undiscovered opportunity for learning.”

As I listened to her talk in November and as I read her words last month, I felt how blessed Ann-Marie was to know Ken. How lucky I was to have had the chance to learn about the man we are truly honoring tonight.

How blessed I have been to journey with so many dear friends.

In closing, I will repeat the charge given to Jim Martin in 1968.

My call to you is to mentor others.

Serve schools, serve youth, serve humankind, serve the future, serve those who will have never known you.

Always remember the words of Dee Forgette: “We can do this!”

For this is the good you can do.

It is your privilege – and it is my renewed challenge to you.

From the bottom of my heart and from the deepest recesses of my soul, thank you.