



OFIS AGM – Keynote Address – “The Perfect Storm Of Education”

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How many people here have seen the movie “The Perfect Storm?” It came out in 2000 and won a few Oscars and other awards which always gets my attention – “Oscar” and I don’t always agree as to what’s a good movie. Also, I really happen to enjoy movies that are based on “true stories” and this one is billed as being based on real life events.

If you haven’t seen it, here’s the plot in a nutshell. In the fall of 1991, the Andrea Gail left Gloucester, Massachusetts and headed for the fishing grounds of the Grand Banks. A handful of ragged, down-on-their-luck fishermen, led by Captain Billy Tyne (played by George Clooney – which incidentally is the 3rd reason this movie caught my attention – I kind of have a thing for him and see all his movies ☺) head out into the Atlantic at the end of the season for one final run. Hoping to beat a streak of bad luck, they ignore warnings of a monster storm brewing and keep looking for swordfish. Two weeks later, an event took place that had never occurred before in recorded history. They get their big haul of fish, but by the time they turn back, it’s too late – everybody and his brother (literally) drowns and the Andrea Gail is lost 575 miles off shore – the victim of this historical “perfect storm.”

This “perfect storm”, as it was termed by the National Weather Service, was an enormous extra-tropical low that wreaked havoc along the entire Eastern Atlantic Seaboard for a few days culminating on October 30, 1991. It was created as a series of weather patterns lined up perfectly in time to create a storm like this and nothing close to it had been seen since 1962 or since.

The first weather pattern to line up was normal for that area and time of year. Late October and November are months with weather in rapid transition in the eastern U.S. To the west, you’ve got large fresh cold air masses from Canada begin to envelope the Midwest on a regular basis. To the east, the Atlantic Ocean is slower to lose its stored summer heat than the continent, and hurricanes or massive storms sometimes form over these warm waters in those months. You have heard of this phenomenon which are called “Nor’easters.”

But then something else happened – another weather pattern emerged. On October 28, an extra-tropical cyclone developed along a cold front which had moved off the Northeast coast of the U.S. With strong upper air support, the low rapidly deepened and became the dominant weather feature in the Western Atlantic.

Finally, there was a third weather pattern that factored. Hurricane Grace, which had formed on October 27 from a pre-existing subtropical storm and was initially moving out north-westward, made a hairpin turn to the east because of the strong, westerly deep-layered mean flow on the southern flank of the developing extra-tropical low. Grace was a decent hurricane and had already generated large swells ranging in size from about 15 feet offshore of North Carolina to about 10 feet near the Florida coastline.

How many of you knew you were going to get the bonus of a quick crash-course in meteorology this morning? ☺ To sum up – there’s the regular, normal seasonal changes going on between the land temps and the water temps at that time of year. But then that extra-tropical low shows up creating an additional cold-front and finally there’s that hurricane that changes direction because of the extra-tropical low.

These 3 weather patterns collided on October 30 just 340 miles south of Halifax with sustained winds of 60 knots and wave heights up to 39 feet. To give you a frame of reference, generally hurricane sea surge waves are around 15 feet – so this would be way bigger ☺ People still talk about the “perfect storm” and everyone knows they are talking about these 3 days in October in 1991.

Now, let’s reflect on this for a minute – you’re a fisherman, you’ve had a crummy season where no one made any money – in fact you’ve had a bunch of crummy seasons where no one made any money. You’ve got one last opportunity to get out and there are weather reports, but hey – there are ALWAYS weather reports in this line of work and most of them never amount to anything. Is the possible success a greater draw than the associated risk?

Is the future of the fishing company more important than the lives that are put at risk? Heck, people die falling on the bunny hill at Tremblant – everything is dangerous right? How do you, as they say, “know when to hold, know when to fold?”

I’m sure you’ve guessed by now that I’m now no longer just talking about fishermen facing the possibility of “the perfect storm.” Webster’s defines a “perfect storm” as a critical or disastrous situation created by a powerful concurrence of factors. Critical – disastrous – that sounds ominous, but not necessarily. But not all of the boats in the movie sank – some came home safely. I want to suggest to you today that we as independent school stakeholders are facing “the perfect education storm” but that a better definition of a perfect storm is this – “the result of different elements coming together perfectly to create something altogether more powerful and truly effective.”

I don’t want you to leave here today thinking that a storm is coming that is so big you will surely drown and cease to be – educationally speaking. I do want you to know that a storm has begun and events that, on their own, are seemingly innocuous but will collide with such ferocity that if you have not paid attention and if you have not bought in to the importance of being part of this network and others, we may in fact not survive. We’ll be taking a look at our surroundings, “read the weather signs” wisely and plot the right course. In other words, WE need to figure out “when to hold and when to fold.”

I mean to share with you this morning certain changes that are beginning to collide in what is shaping up to be “the perfect education storm.” And then I mean to share with you a “manual for stormy seas” so to speak, so that OFIS and its schools can “steer the ships” through stormy seas and weather the “perfect education storm.”

There are economic, demographic and political “weather patterns” developing that I believe will collide sometime very soon to create a perfect education storm:

1. The Economy Has Crashed Or Is Crashing (this depending on who you listen to) – Unless you’ve been under a rock or in complete denial for the last 6 months, you can’t escape the sights and sounds of global economic panic. The number of home and business foreclosures, personal and business bankruptcies, lost jobs particularly in manufacturing, government bail-outs for major companies, stocks that are becoming worthless and stalled consumerism is being seen in proportions not since the Great Depression of the 1930’s. People seem “frozen” in fear that the economy will keep falling and that we haven’t seen the worst of what some financial experts are predicting will be more drawn out and deeper than the Great Depression. And many of these same experts say that the business world, the financial world and the people of the world will never be the same again. New jobs and opportunities will eventually come but those things we knew before will never be here again.

The length of time this recession/depression lasts and the fear people feel about their money will inevitably trickle-down and affect our schools as parents lose jobs or experience cutbacks, donations dry up, people possibly needing to cash in savings to cover debts. Big purchases like independent school tuition may feel out of reach for a growing number of people as everyone holds off on spending. And the temptation to make household cuts for current families may prove irresistible depending on how long this crisis lasts.

Now Dave Bird is giving a workshop today on “Survival Tips” during economic uncertainty which we added recently given the deepening economic concerns and I don’t want to spend too much more time here on specifics. Knowing Dave, if you attend his workshop today, you will get ideas and be challenged and be given opportunity to present questions that are specific to your concerns and local situation.

2. National Birth-Rates Are Declining – that’s right, we are all just having less babies which means that eventually there will be less students to educate. Less students to teach means that we will all increasingly compete for a distinctive niche portion of this shrinking marketplace. Since 2002 there are 90,000 less children in school in Ontario. These rates look to decline more sharply moving forward. According to Statistics Canada the number of students in Canada’s elementary and secondary schools will decline by as much as 500,000 in the next 10 years.

The population between the ages of 5 and 14 may begin to slowly increase after 2016, but the population aged 15 to 19 will continue to decline until 2021. And, Statistics Canada does not predict ANY school-age population boom in the foreseeable future.

Since the public schools' funding allotments are tied to enrolment, and since 52 of these schools are facing closure in Ontario under the accommodation review process, and since this means that teachers would lose jobs and boards would lose funding, public schools are feeling increased urgency to find more students just to maintain their status quo. Logically, the only places to find more students in a market where there are less children being born, are in independent schools and home schools. They will try to accomplish this in a couple of ways.

First, Public and Catholic school boards are advertising for students. You probably have noticed an increase in radio and print ads for these systems as they attempt to distinguish themselves as the best choice for families. Ongoing advertising campaigns are in the works, and while I couldn't get any "sure answers" from any record or document, Public Schools, in partnership with their supporting unions, will spend \$600,000 on advertising in the coming year. Independent schools, many of which have always advertised, will now not only compete with each other for this public attention, they will compete with a bigger machine that has more money and that has never felt it HAD to advertise in the past.

Secondly, public and catholic school boards are looking to offer public education in a greater variety of settings so it looks like more choices for families. Consider the afro centric and waldorf public schools being planned in the Toronto School Board for the fall of 2009. A Toronto Sun journalist says that 42% of the applicants so far for the new afro centric school will come from independent schools in the region. Consider Eden Public School which in the Niagara School Board is a Christian program in a public school. Besides the fact that the existence of this school flies in the face of everything the premier said about "religious schools" in the last election, it is successfully beating out 2 other independent Christian High Schools in St. Catharines and Smithville respectively, for students annually. As these "free choices" emerge in public education, independent schools will be challenged to compete with similar looking programs with very attractive price tags sometimes right around the corner.

This information is readily available from groups like People For Education in their annual reports on education. Their spokesperson, Annie Kidder annually advises the government to do these things so that funding levels can be maintained and increased even. Now Annie and I haven't agreed on much over the years, but we do agree on one thing. She says that "we will need new thinking on this issue and that we have to use this potential crisis as an opportunity to break down all old barriers." I'm pretty sure this is where our agreement will end because her "new thinking" and her notion of "breaking down all old barriers" means tinkering with the current system and I believe that what is best for students in Ontario means radical overhaul and greater inclusivity in education. Alberta and BC are great Canadian examples of where Ontario could head.

3. The Ontario Political Climate Towards Independent Schools Is Cool And Maybe Getting Colder – if you listened to the last little section of my remarks very carefully, you might get the idea that I am suggesting that the Ontario government has a subtle plan to compete for the independent school demographic, which is 120,000 strong, by simply squeezing us out of existence through expensive, saturated advertising, offering more alternative public education programs and increasing regulations and expectations to untenable levels. While I can't comment with any authority on whether this is actually their plan, I cannot help it if you are intelligent people who can put 2 and 2 together and see a subtle plan taking shape for yourselves! ☺

Let me give you a few more examples and you can decide for yourself:

-The current premier of Ontario RETROACTIVELY removed a tax credit that provided just fewer than a million dollars to parents who send their children to non-publicly-funded schools in 2001. He said that the money was needed for public education but money is only sent to public schools based on enrolment. So where did that money actually go?

-During the last provincial election in Ontario, the current premier, told the people of this province that children who attended faith-based independent schools, along with their families, were a THREAT TO SOCIAL COHESION, which was after he told the public 4 years earlier that all of those children and their families were WEALTHY and ELITE and undeserving of public assistance. So, how does he explain societal peace while Ontario has funded Catholic religious education fully since 1985?

-Until last year, independent schools in Ontario received grants from the federal Heritage Fund for bilingual instruction. The provincial government distributed those grants to independent schools on behalf of the federal government. The current Minister of Education, a former public school teacher and trustee, decided to no longer distribute those federal French grants to independent schools. She said that the schools were not inspected so there was no guarantee the grants were being used to teach French. She said that the money would be given instead to the public schools. Public schools did not get that money last year. So where did the money actually go?

-The Notice of Intent To Operate that must be filed annually with the provincial government by each independent school had some seemingly minor changes made to it this past fall adding questions about teacher qualifications and school insurances. Why is this information being gathered when it has never been gathered before and it is increasingly difficult to even find any information on independent schools on the Ministry website? Looking at the recent increased regulations on private career colleges and early childhood educators, and the widened privileges granted to the Ontario College of Teachers and the newly formed Association of Early Childhood Educators, one can only wonder how difficult the government will make it to own and operate a private school.

There are more examples, some of which we will discuss in this afternoon's workshop – "Hot Topics In Independent Education." We need to pay attention to these government moves and be prepared to respond to them. Regardless of whether or not you are in favour of funding equity in education, there are many other ways that government and independent schools intersect and it will only be the independent schools that work together that will help bring about measures that protect even the current privileges and benefits that seem to increasingly be in jeopardy.

An economic disaster not seen in 70 years, birth rates declining here for the first time in recorded history and a provincial government that seems increasingly petty in its treatment of independent schools, are lining up in a way that a "perfect education storm" is not only possible, but inevitable.

Right off the bat I want to say that there are certain things NOT to do when facing the "perfect storm." One way NOT to handle the perfect storm is to complain about the weather. You don't go through any storm, much less one like this, whining, whimpering and wringing your hands.

If you put your life on hold while waiting for the weather to break, you could spend a long time waiting for those perfect conditions. Adjust yourself accordingly; knowing that one day the weather will break indeed. The perfect storm may last days, months, years or decades, but the storm will leave as it came, with almost supernatural suddenness.

Rather than waste time in weather bashing, invest yourself in weather reports: watch these 3 patterns, the economic, demographic and political phenomena and work them into a prognosis for the days and weeks to come.

I have been involved with independent schools in one way or another for my whole life – as a student, a teacher, a parent, a political advocate and now as the executive director of OFIS. Like many of you, I am in for the "long haul." I have a poster in my office that reads..."the pessimist complains about the wind; the optimist expects the wind to change; and the realist adjusts the sails." You simply must take a long view to these patterns and adjust plans accordingly.

Another way NOT to handle a storm is to blame – blame the unjust government or blame the "non-child-bearing" parents or blame the economic leaders getting the bailouts and bonuses. Blaming is energy used unproductively

and it doesn't make weathering storms any easier.

A third way NOT to handle the perfect storm is too much crisis management and risk assessment. The idea that any storm can be managed just seems ambitious and arrogant. To try for any kind of control or clean-up when you're holding on for dear life as Mother Nature does a demolition job is delusional. Damage will be done and dust will settle.

The fourth way NOT to handle the perfect storm is to spend your time fighting with the other passengers on the boat. Independent schools and independent school associations are celebrated for their independent thinking but they are also notorious for their independent thinking to the point where they are fighting and competing with each other over who's got the better seat or the better view, while there's a storm outside ready to capsize the boat. I believe that politicians know that the independent school community is split and easily capable of turning on each other which is why they can ignore us more often than not.

So, those are the ways NOT to handle the perfect storm – so what CAN we do? As you will hear more about later this morning when the OFIS board shares some of the work it has been undertaking in the last year, OFIS sees itself helping independent schools in Ontario in 2 important ways:

1. Schools need to be encouraged and assisted to improve their services and operations. On-going improvement helps schools serve their families & communities better and it establishes greater public credibility. Greater public credibility grows individual schools and increases public awareness and confidence in the contributions of schools to the province.

2. Schools need greater representation by a publicly recognized, growing network of independent schools that will advocate for increased access to government educational resources as well as protect and support independent schools' rights to reasonable self-definition so that families have real choice.

These 2 goals are more important than ever in the face of the perfect storm. Independent schools, large and small need to know they are part of a crew that is reading the weather signs and prepared to navigate these stormy times. I'd like to suggest the "manual for stormy seas" – 5 things for all of us independent school helmsmen to keep in mind – there needs to be a bit of a disclaimer here – they may seem at odd with common sense – but remember what I said about how Annie Kidder and I have different interpretations of "new thinking" and "breaking down old barriers!"

1. Lift Anchor And Put Out Into The Deep!

Emily Dickinson wrote – "the shore is safer, but I love to buffet the sea – I can count the bitter wrecks here in these pleasant waters, and hear the murmuring winds, but oh, I love the danger!"

In times of storm, the shore is NOT safer, despite Emily Dickinson! In fact, the shore is the most dangerous place to be in the midst of a storm. While the world is raging with gale-force winds and waves, there's a tendency to hug the harbour and wait out the storm. Independent school folks should instead lift anchor and head out into the deep waters. The school of the perfect storm is a place that is wisely looking and slowly lurching forward, not a place that is stuck in nostalgic, glory day poses. And schools ought to think of OFIS like the Weather Channel, providing resources and weather alerts, helping track the storms and building databases from which to learn.

- develop strong policies and sound financial practices, taking a longer view to the survival and success of your school

- develop a strong leadership team that oversees the school program as evenly as the business management of your school

- get more involved with OFIS events, resources and services, sharing best practices and "best crashes" from your adventure – engage in the OFIS discussions and initiatives regularly

- don't stop advertising, change your advertising so clients see your school as a "safe haven" for students and

families during uncertain times – think Wal-Mart and Canadian Tire as examples

There is much evidence from previous recessions and times of economic and political uncertainty that independent schools, despite financial fears, increased their enrolment as families invest in what they consider to be the truly important things that bring future security – like their children's education!

2. Steer Into The Wind!

Just as you can't escape the storm, you can't outrun the storm either. Once you're out on the high seas, the worst thing you can do is try to flee the storm. Whether you reverse engines or batten down the hatches, the storm will hunt you down and overtake you every time. The turning tides of the economy, changing demographics and unfriendly politics cannot be turned back or turned off no matter how "storm-phobic" you are! Once we learn the truth about what is happening in our world, whether we like it or not, we must learn to be at home in the strange times we're in.

- identify and develop the unique niche of your school by finding additional ways to serve your families creatively – become irreplaceable
- find ways to correct misperceptions in the media about independent schools or give an independent school perspective on a general education issue so that you become a know and credible contributor in your local community.
- find ways to be involved with your local community and not be isolated by your independence – chamber of commerce, social justice, community events – be known appreciated, not unknown and misunderstood.

The Toronto Star featured a story recently about a couple of independent Jewish schools in the GTA who owe rental arrears to the Toronto Board for use of closed public schools. A trustee interviewed for this story said that "private little schools" tend to be unreliable tenants.

We should all feel the obligation to correct these types of generalizations, misperceptions and sometimes, inaccuracies.

3. Get Rid Of Excess Cargo And Toss Heavy Burdens Overboard!

In the movie "The Perfect Storm", part of the reason the Andrea Gail did not survive was because Captain Billy Tyne refused to abandon a bulging shipload of swordfish. Sometimes life requires us to part with those things that are not essential to the mission, vision and values of our school. My husband who is a pastor is fond of saying that "every once in awhile the church needs a yard sale – in fact it's quite overdue for one." He means that sometimes we need to throw some modern cargo overboard, and simultaneously re-cover, re-new and re-use some ancient treasures we've lost in forgotten corners of the hull.

Plato liked to compare life to a big triangle. Along the base are those things we deem important. But the more we move up the triangle to the apex of the thing, the smaller the base gets and the more we need to get rid of things of lesser importance else we topple.

- streamline your program putting most of your resources behind your most successful programs
- temporarily dump your ineffective, money-draining programs
- streamline staff for efficiency and effectiveness, watch for the "loyalty trunk!"
- check policies for growth inhibiting practices, language and inconsistencies

4. Lash Yourself to the Mast Of Your Values – Steady As She Goes!

The more a storm spins out of control, the more the need for a fixed point and the more we need to lock our hands on the tiller of truth – our core values.

Ancient mariners would sometimes instruct helmsman to lash themselves to the helm so that they could pilot ships through the worst storms. “Steady as she goes” is the phrase the captain of the ship used to get everyone, including himself, focused, not on staying the course, but on steadying the wheel to better manoeuvre into the storm. Staying the course, especially courses that were set before a storm hit that changed the look all cruising lanes, is a decision for death.

-if you’re following a strategic plan or a business plan, have you altered it to consider the perfect storm? Maybe the perfect storm wasn’t in sight when the plan was created. Trying to hold tight to it, may mean death. I had a non-OFIS school approach me about some help with a capital campaign recently. After hearing their plans and viewing their campaign timeline and materials, I urged them to delay the campaign (no shovels in the ground yet) and work instead on streamlining the school as an organization, keeping true to their core values and preparing the school for a stormy season. I told them that a delayed campaign was better than a failed campaign. Well, believe it or not, they felt that following that campaign schedule created 2 years ago was more important and they have some huge financial problems, bigger leadership problems and probably most important, a huge perception problem amongst their supporters. The jury is still out on whether they will survive this.

5. Enjoy An Epic Ride!

My grandfather died at age 93 just a few years ago. He died of a heart attack while riding his bike to church on a Sunday morning which was more than 5km from his home. He LOVED his church. The year before he died there was a conflict in the church that resulted in several congregational meetings and ultimately in people leaving the church, including many of his own friends.

My grandfather was a faithful attender of meetings but not a big talker. He finally spoke near the end of the last meeting, “I know a lot of my friends have left this church because of this controversy. And I have listened to some of your decisions tonight, whether to go or to stay. Here is where I am: when you’re in a storm, you can ride the wave in and out, or you can ride the wave up and down. This is my church. I’m too old to play the in-and-out game. I’ll ride the wave up and down, and enjoy the ride.”

Ride the waves, even when it feels like your school is in trouble. Lash yourselves to the mast of your values, which are the reasons you came to be at your school or the reasons you started your school. Be an inspiration to the students and families who stick with you through the storm and take seriously the responsibility of preparing young minds for public service. Take time to enjoy the “wins” with students and share those stories liberally with other staffers and educators. The legacy of independent schools cannot be forgotten or underestimated – it is the reason many of us are in the business, ‘cuz it certainly isn’t for the great hours, pay and coffee! ☺ How we each spend our days and our lives is our legacy and there are few things nobler than influencing future leaders!

In these times, there are storm clouds not just on the horizon, but overhead. This is more than simply making heavy weather about the weather. An unblinking conversation with history reveals that the transformations taking place economically, demographically and politically are without precedent in recorded history, just like the perfect storm that sank the Andrea Gail was previously unrecorded in history. We have every reason to doubt and be afraid but we also have reason to hope. In the movie, “The Perfect Storm”, the boats did not all sink – there were many that made it safely back to harbour once the storm subsided. There were obviously boats that did “the right things” when faced with the perfect storm.

John W. Gardner, the great American education reformer said, “We are all faced with a series of great opportunities brilliantly disguised as insoluble problems! What will you do as you see the coming storm through the telescope – discover the great opportunities or be mired down by the insoluble problems?”

OFIS wants to see you discover the great opportunities! We are changing to serve schools better. We are leading in activities that will connect independent school groups in partnership in approaching government on issues important to all of us. During the AGM portion of our time together today, you’ll hear more about how OFIS is taking its responsibility of providing responsible weather reports, good navigational equipment and support so

that all of its schools arrive safely back to harbour. We look forward to what the future will bring regardless of what's on the horizon.