

Living Strategy and Inclusive Momentum: Building Muscles That Matter

ACIS Annual Conference Keynote
October 10, 2025



70% of all change initiatives fail...

- HBR, Oct. 2023



Setting the Context

Select
Independent School Trends





Centering Belonging: Navigating the Tension Between Mission and Culture Wars

Source: MehtaCognition Research Trends, 2020-2025

The Crisis of Inclusivity and Identity:

- Many schools face a **pronounced gap between their welcoming culture and the lived experience** of inclusivity for diverse families and employees.
- Some schools note a **lack of belonging experienced by some members based on racial identity or income**. Similarly, others face challenges addressing **lagging belonging among non-white, Hispanic, and Jewish-identifying** families.
- For faith-based schools, **demographic shifts introduce tension between traditional values and evolving concepts of diversity**. For instance, one school noted that newer families value diversity/inclusion less than older families in PreK-2nd grade, and value inclusion less in 3rd-5th grade.

The DEIB Misalignment and Political Headwinds: Our research confirms the "culture-war politics" context, revealing significant misalignment and tension among stakeholders regarding the intent, impact, and pace of DEIB efforts.

- Multiple schools face an underlying tension where **some parents feel DEIB is "too politicized," "too liberal," or overemphasized, while others want more emphasis on diversity/inclusion**.
- This misalignment is not just external. At one school, there is a **misalignment between parents and employees about DEIB emphasis**, with faculty and employee groups more supportive of DEIB work than parents, who may feel it is being overemphasized. This tension can lead to dissatisfaction and potentially impact recommendations to others.
- The opportunity lies in **clarifying the DEIB approach and mission alignment**, specifically equipping teachers to navigate these diverse identities and perspectives constructively.



Strategic Subtraction: The "Everything School" Dilemma

Source: MehtaCognition Research Trends,
2020-2025

The Cost of "Doing It All": Leaders must recognize the hidden costs associated with being the "everything school."

- Stakeholders at one school **expressed frustration that the school attempts to do "too much" and is trying to be everything to everyone**, which results in a lack of clear focus and priorities.
- Faculty at several schools reported similar stress, noting a perception that their school tries "to be all things to all people more than we can actually deliver," **leading to an identity crisis and unclear priorities**. Lastly, many face a **tension between maintaining their strong learning support program while simultaneously attempting to appeal to all learners**, leading to a feeling of being spread too thin.

This diffused focus often results in weaknesses in specific areas, such as one school's lack of perceived robustness in elective and extracurricular offerings, or another's decline in the arts program impacting its identity and retention.

Shifting Focus from Activity Counts to Impact: The need for strategic subtraction emphasizes focusing resources on high-impact experiments, moving away from merely counting activities.

- The core concept of strategy is **making an integrated set of choices** to create a sustainable advantage and deliver on the mission—it is not about trying to predict the future.
- Instead of activity counts, **schools must focus on Perceived Value relative to their competition**. Measuring NPS (Net Promoter Score) longitudinally is a practical tool to assess loyalty and overall mission fulfillment, allowing leaders to measure impact over mere activity.



Building the Decision-Making Muscle: Consistency, Transparency, and Talent

Source: MehtaCognition Research Trends, 2020-2025

Inconsistent Implementation and Policy Drift: The ability to execute strategy is hampered by inconsistent practices and lack of transparent communication, suggesting that administrative muscles are often strained or underdeveloped.

- At one school, employees express concerns about **policy consistency and transparency** in areas like decision-making, hiring, and equity. Inconsistent communication and policy implementation also emerged as a recurring theme among faculty.
- There are frequent perceptions of **inconsistent approach to discipline**, or inconsistent implementation of core pedagogical models.
- The lack of consistent follow-through on initiatives often occurs when the **leadership team is stretched thin** and there is insufficient focus or support for implementation.

The Talent Retention Crisis: Strategic agility requires a stable, well-supported faculty and administration, but the national teacher shortage is compounding internal challenges related to workload and compensation.

- The **emerging national teacher shortage** is cited as a major threat across multiple schools.
- This threat is exacerbated by internal employee concerns: at Green Vale, less than 50% of MS and LS faculty believe morale is high, and **only 1/3 of employees feel they are compensated fairly**.
- For resilient schools, addressing **employee resourcing and retention strategies**, especially for younger faculty, is crucial for long-term sustainability.

The Value of Data-Informed Decision-Making: To avoid being "stagnant" or relying on a "plan," strategy must be ongoing and data-informed. The use of custom research and ongoing data collection is critical for resilience.



Navigating External Headwinds

Source: MehtaCognition Research Trends, 2020-2025

Demographic and Economic Pressure on Affordability: Independent schools universally face challenges relating to high price points and the perception of value.

- **Affordability strain** due to high tuition and pricing, leading to a corresponding **decline in perceived value**, is a frequent threat.
- Families are **highly motivated by price/value comparison**, and many are willing to choose other options if the tuition benefit does not clearly outweigh the cost and outperform competitors.
- **Demographic shifts**, such as birth rate decline and population loss in metro areas, exacerbate enrollment difficulties.

The Rise of Personalization/Differentiation: The increasing challenge of meeting diverse student needs necessitates personalized learning approaches.

- A major thread across the engagements is the **widening student learning profile and the resulting struggle of faculty** to meet the increasing demands for differentiation and learning support.
- Faculty members feel they are constantly accepting students with more complicated learning profiles and **lack the necessary training or support structures** to address these needs effectively.
- This suggests an opportunity to **develop clearer philosophy and robust approaches to address the widening range of student learning needs**, making this responsiveness a key component of future strategic advantage.

Niche Programming as Differentiation: In competitive markets, perceived value hinges on unique offerings.

- **Special niche programs** (like leadership, Model UN, or medical tracks) are increasingly influencing family school choices, and schools that are missing these unique curricular offerings risk being perceived as less distinguishable.

What is **Strategy**?

STRATEGY IS DEFINED AS:

An integrated set of choices that collectively positions an organization to deliver on its mission and to create a sustainable advantage relative to the competition in its market.

CRITICAL NOTION:

Strategy is not about trying to predict the future; it's about trying to shape the future to your advantage.

Source: Adapted from Roger L. Martin, "Don't Let Strategy Become Planning," Harvard Business Review, February 2013.

*“Strategy is not the same as organizational effectiveness. Differentiation arises from both the **choice** of activities and **how** they are performed.*

Activities, then are the basic units of competitive advantage.”

Strategic Planning



An aerial, high-angle photograph of a large crowd of people crossing a street. The people are seen from above, moving across a crosswalk with white stripes on a dark asphalt surface. The crowd is diverse in age and clothing, creating a sense of a busy, public event. The text is overlaid on the center of the image.

What is Culture?

“Culture is the temperature, **not** the forecast.”

- Jason Fried

Taking the **Temperature**, Defining the **Forecast**





What is Culture?

“Culture is not a set of beliefs, it’s a set of actions.”

- Ben Horowitz, quoting *The Way of the Samurai*

Levels of **Organizational Culture and Change**



“Wherever possible, change must be linked to the enduring values that have bound people together.”

“Everyone needs to know what won’t change.”

What are your enduring values?

What will remain the same?



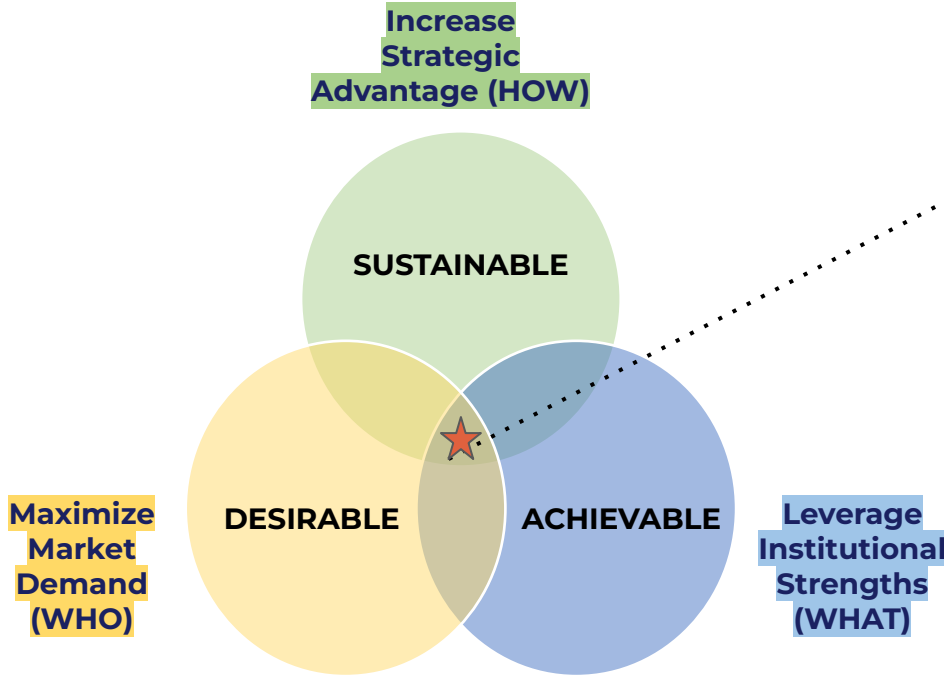
STRATEGY: is not about trying to predict the future; it's about trying to shape the future to your advantage.

GOAL: Preparedness and positioning through data-informed “smart choices.”

CRITICAL NOTION: Strategy is about uncovering your “sweet spot” - and how to achieve it well.



Our Approach to Strategy



STRATEGIC POSITIONING:

A research-based strategy to connect The XYZ School's target market and the problem(s) and key driver(s) desired stakeholders face (“**who**”) with what XYZ is already good at or capable of becoming great at (“**what**”), enabling XYZ to thrive long-term by delivering unique and compelling offerings (“**how**”).



VALUE PROP (“WHY”):

A concise statement or summary that **defines why** stakeholders should invest in The XYZ School, based on strategic research that **proves** the statement is **desirable** (*articulates concrete benefits right-match constituents want*), **achievable** (*right-match constituents believe XYZ delivers on it*), and **sustainable** (*fosters enduring preference for XYZ*).



PERCEIVED VALUE

How parents or employees choose (or don't choose) your school.

$$\text{VALUE}^* = \frac{\text{Satisfaction \& Perceived Benefits}}{\text{Actual \& Psychological Costs}}$$

CRITICAL NOTION

Families and employees invest in a particular independent school only when the school convinces them that enrolling or re-enrolling benefits them more than other factors that cost them - and that the particular school outperforms other options.

Strategy is the connector...



PRESENT



STRATEGY



FUTURE

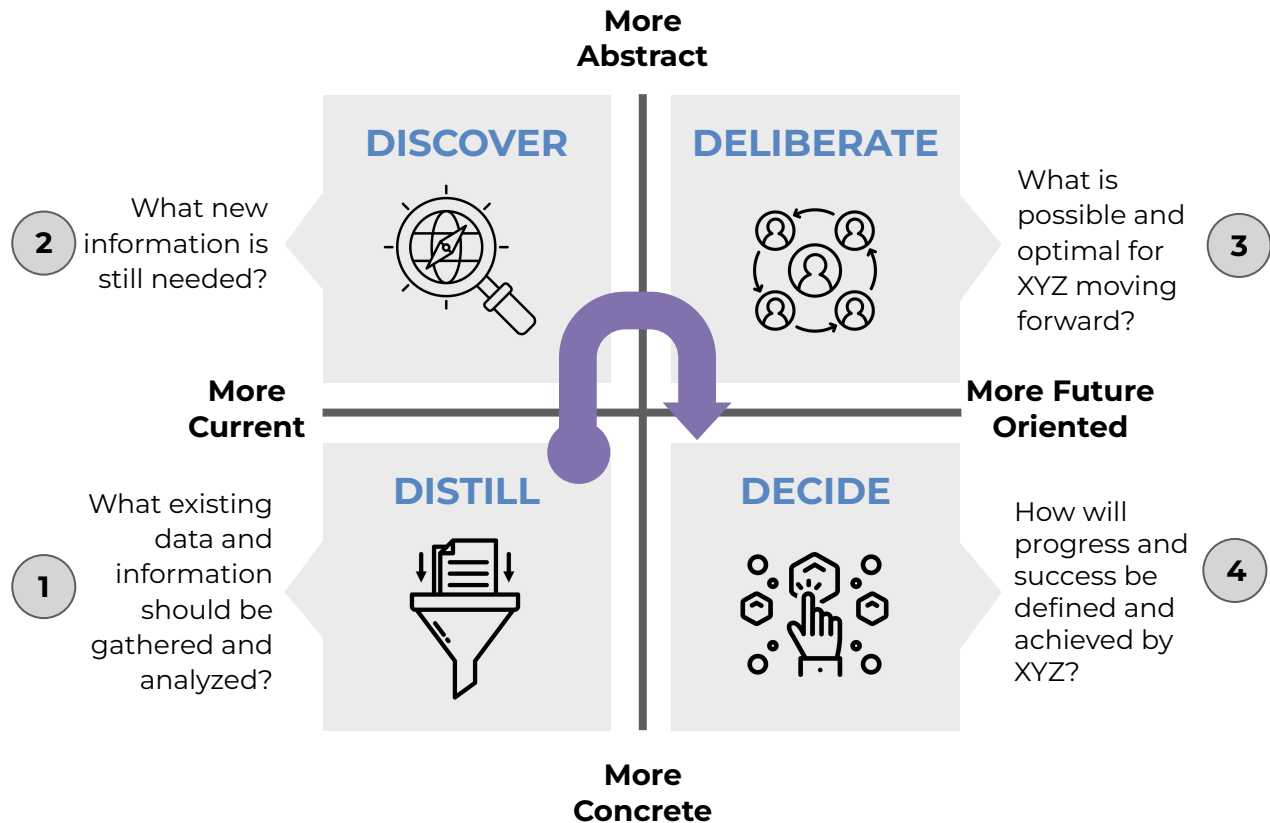
If strategy connects and reinforces...



...metrics and **data** are our **building blocks**...

Process

A four-part process that leads to **sustainable success** by facilitating an **actionable plan**, aligned with XYZ's **intentional culture**, and rooted in **authentic strategy**



Key Concepts in Financial Sustainability

Perceived Value



- Research shows that families invest in a particular independent school only when the school **convincs** them that enrolling or re-enrolling **benefits** their family more than tuition and other factors **cost** their family - and that the particular school **outperforms other educational options**.
- A school's **perceived value** is often represented by the following conceptual equation:

$$\text{Value} = \frac{\text{Satisfaction \& Perceived Benefits}}{\text{Actual \& Psychological Costs} \dots \text{all relative to the competition}}$$

Types of Data



- **Demographic Data:** Fact-based (objective) statistical data such as age, income, presence and age of children, etc. collected and analyzed for a particular population



- **Psychographic Data:** Subjective data collected about a particular population's attitudes, values, aspirations, and other psychological criteria

Ability vs. Willingness to Pay

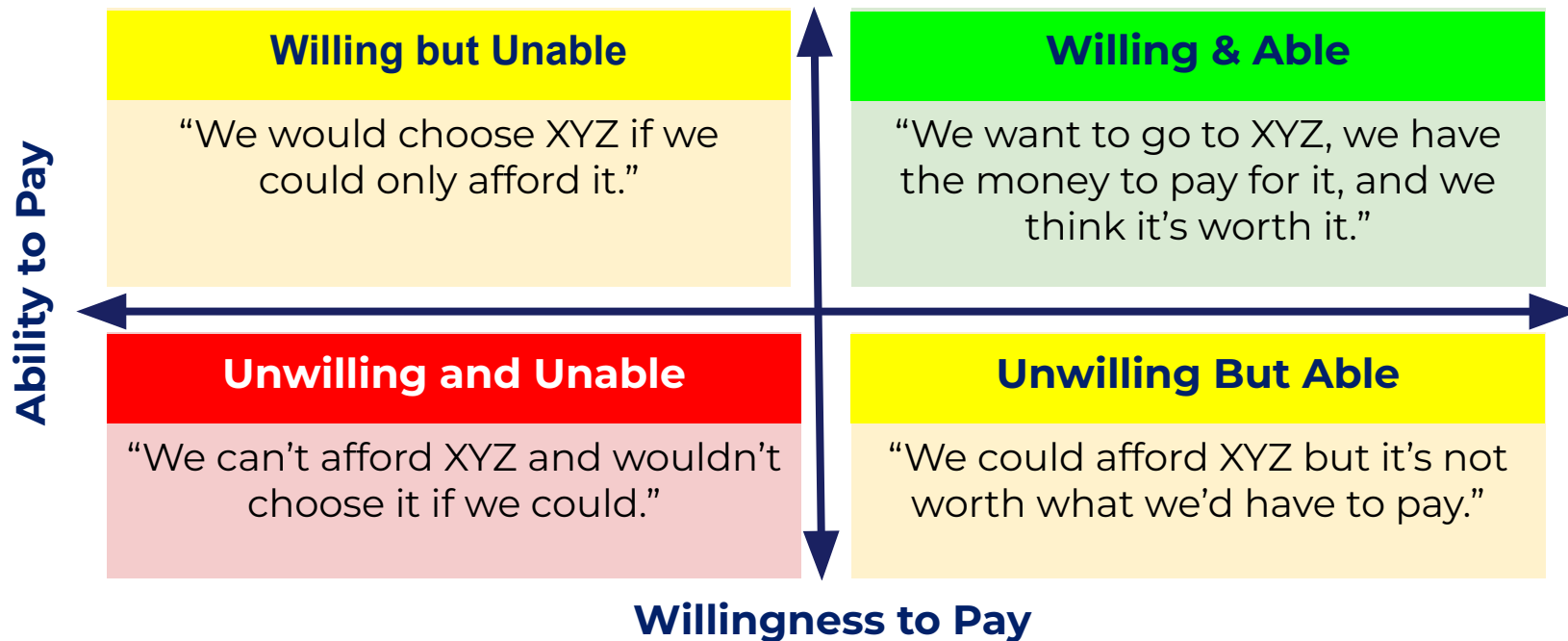


- **Ability to Pay:** *Demographic*
"We have the money to pay The XYZ School's tuition."



- **Willingness to Pay:** *Psychographic*
"We think The XYZ School is worth the cost of tuition."

Use research insights to assess **your school's perceived value**:



Source: NAIS, *Marketing Independent Schools in the 21st Century*, "The Affordability Dilemma," Mark Mitchell.

Mission, Vision, and Strategy = Clarity

XYZ's MISSION

XYZ's VISION

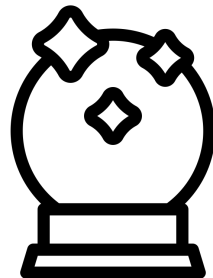
XYZ's STRATEGY

Modes of Leadership



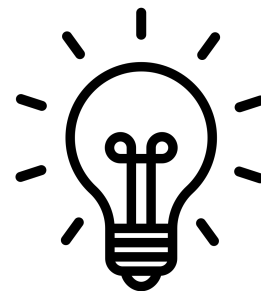
FIDUCIARY

- Protects assets
- Ensures smooth functioning
- Ensures efficient use of assets
- Acts in the best interest of the organization



STRATEGIC

- Discovers strategic needs
- Establishes priorities of needs and resources
- Generates and implements the plan



GENERATIVE

- Ideates outside the box
- Challenges norms
- Suspends what we *think* we know
- Anticipates the future

Critical Notion:



A clear mission and strategy
says
We do this, we don't do that.

Because...

The future will punish
certainty and reward **clarity**

**So Then,
Why Do Many Strategic Plans
Never Make It Off the Shelf?**

STRATEGIC COMMUNICATION PLAN

OWNERSHIP

Cultural Anchoring

Where is the community?

What is our actual starting place?

How does it connect to what I love?

STRATEGIC PRIORITIES

Teacher Recruitment and Development

Academic Strength

Financial Flexibility

Emotional Health / Well-being

Community & Belonging

CAPACITY

Sustainable Implementation

Leadership

Bandwidth

Skill-set

Resources

Time

Clarity

PEOPLE, PROCESS AND PRIORITIES BEFORE PACE

OWNERSHIP + CAPACITY + FOCUS = MOMENTUM

Create an **Action Plan Framework**

Effective strategy can be summarized with simple words and concepts.



Success vs. Failure of Initiatives

NO VISION + Ownership + Skills + Incentive + Resources + Action Plan = **CONFUSION**

Vision + **NO OWNERSHIP** + Skills + Incentive + Resources + Action Plan = **SABOTAGE**

Vision + Ownership + **NO SKILLS** + Incentive + Resources + Action Plan = **ANXIETY**

Vision + Ownership + Skills + **NO INCENTIVE** + Resources + Action Plan = **RESISTANCE**

Vision + Ownership + Skills + Incentive + **NO RESOURCES** + Action Plan = **FRUSTRATION**

Vision + Ownership + Skills + Incentive + Resources + **NO ACTION PLAN** = **TREADMILL**

Vision + Ownership + Skills + Incentive + Resources + Action Plan = CHANGE

Thank You!



NISHANT MEHTA
Founder & President
[MehtaCognition](#)

nishant@mehtacognition.com

Cell: 470-989-3272

Blog: mehtacognition.substack.com

[Coach me like Nishant](#)