

Senior School Leaders Business Strategy Cohort: Five Working Sessions to Strengthen the School Model

Cadence & Timing

February–June 2026 · One hour monthly call

Audience

Heads of School (primary audience)

CFOs/Business Officers, Enrollment Managers, Development Directors, and Board Finance leaders may find certain sessions valuable as well.

Cost

- Free for schools and all interested leaders with ACIS PD Series Subscriptions
 - \$150 per school and all interested leaders without a PD Series Subscription. Schools without subscriptions will be invoiced.
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Register

- Each school person should register [here](#):
 - Zoom login information will be sent to registrants prior to each session.
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Cohort Overview

This five-part cohort is designed to deepen senior leaders' business fluency and introduce new approaches to strategy development and execution. Through a sequence of practical, applied sessions, participants will strengthen their understanding

of how financial, enrollment, advancement, and operational levers interact to shape a sustainable school model.

Each 60-minute session, facilitated by Peter Baron of MoonshotOS and featuring guest experts, blends practical insight, hands-on tools, and peer dialogue to help leaders build business acumen, test ideas, and apply proven frameworks in their schools.

Session Topics & Guest Experts

1. **Strategy to Execution: Operating Rhythm for Leadership Teams**

February 2026

Peter Baron, Founder, MoonshotOS

peter@moonshots.com

a. Date: **February 12, 2026, 11 am - 12 pm MT**

b. Brief session description:

Most schools have a strategic plan. The harder part is deciding what actually gets attention when daily demands keep piling up. This session helps senior leaders step back and examine how priorities get set in the moment, what keeps slipping, and why important work stalls even when everyone agrees it matters. We introduce the School Operating System (SOS) as a practical approach to clarify prioritization, reduce reactive decision-making, and keep the most important work moving despite constant interruptions.

2. **Alternative Revenue That Actually Moves the Needle**

March 2026

Guest: Karen McClelland, Executive Director of Auxiliary Programs, Sidwell Friends.

mcclellandk@sidwell.edu

a. Date: **March 12, 2026, 11 am - 12 pm MT**

b. Brief session description: Independent schools often explore auxiliary or non-tuition revenue streams, but not all strategies meaningfully impact the bottom line. In this session, participants will dissect what truly drives sustainable, mission-aligned revenue growth. From optimizing existing programs to innovating new offerings, we'll examine proven models, hidden opportunities, and common pitfalls. Participants will walk away with a clearer understanding of which levers generate real financial value, how to evaluate ROI, and how alternative revenue can strengthen overall school

strategy. This session blends practical frameworks and tools with real-world examples to help leaders make informed, high-impact decisions.

3. **Enrollment Engine: Marketing, Yield, and Retention**

April 2026

Brendan Schneider, CEO, SchneiderB Media (Enrollment/Marketing Strategist).

brendan@schneiderb.com

- a. Date: **April 14, 2026, 11 am - 12 pm MT**
- b. Brief session description: Enrollment success is no longer about waiting for families to find you. In this session, participants will explore how marketing, yield, and retention work together as an interconnected engine that drives sustainable enrollment. We will examine why schools have traditionally been too passive in their follow-up, what leading indicators actually predict enrollment outcomes, and how to move from "gatekeeper" thinking to a proactive, systematic approach. Heads will leave with a framework for having more strategic conversations with their admission teams, the right questions to ask about their enrollment funnel, and clarity on what distinguishes schools that fill seats from those that struggle.

4. **Advancement as a Strategic Growth Driver**

May 2026

Mattingly Messina, Founder, Throughline (Advancement Strategist and Consultant).

mattingly@findthroughline.com

- a. Date: **May 5, 2026, 11 am - 12 pm MT**
- b. Brief session description: Independent schools can no longer treat advancement as nice-to-have — it's one of the key components of long-term financial sustainability. In this session, we'll unpack how philanthropy works with other areas of your school to drive revenue and build relationships. Participants will explore the metrics, decision levers, and leadership behaviors that distinguish schools that merely fundraise from those that strategically grow. You'll leave with a clearer understanding of how to align Board governance, Head leadership, and advancement strategy to support your school's mission and margin.

5. **Translating School Finance: What Every Leader Needs to Understand**

June 2026

David Hanson, CFOO, The Branson School; Managing Partner, Winthrop &

Associates

david_hanson@branson.org

- a. Date: **June 9, 2026, 11 am - 12 pm MT**
 - b. Brief session description: When school finance comes up, many leaders feel like the conversation suddenly shifts into another language. In this session, David Hanson, CFOO at The Branson School and founder of Winthrop and Associates, will make finance make sense—helping you translate key financial terms, decode board reports, and speak with confidence about budgets and resources. You'll walk away better equipped to connect financial realities to mission-driven work and to participate more fully in schoolwide decisions that shape your future. Bring your questions and be prepared to expand your financial vocabulary.
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Potential Cohort Outcomes

- Sharper financial and strategic fluency for heads and senior leaders.
- Tools to help align finance, advancement, and enrollment priorities.
- Focus on ways to increase revenue generation
- Clear frameworks to convert learning into action within each school.
- Optional NAIS in-person meet-up for participants in March.