IAN SYMMONDS & associates

FALL 2026 BRIEFING

State of the Industry

What every independent school and college board should understand about this moment — and how institutions move from pressure to advantage.

State of the Industry

Private education is entering a decade where mission alone will not be enough. Independent schools and small private colleges face a convergence of demographic pressure, affordability concerns, AI disruption, shifting family expectations, and fragile financial models — all at once, all compounding. The winners will be institutions that align mission, market, money, governance, and human differentiation before crisis forces the conversation. Here are the inflections every board should understand about this moment in time.

1. The private education model is under structural pressure

Private schools and colleges are struggling; failing and closing at an increasing rate — and this is expected to continue. They are not failing because people stopped caring about them; they are struggling because history, loyalty, and goodwill no longer overcome market misalignment or financial fragility. Closures rarely begin with a single crisis. They emerge from years of flat enrollment, rising tuition discounting, deferred maintenance, unrealistic budgets, and reliance on one-time gifts for recurring expenses. The old assumption that demand will eventually return is no longer a strategy. Institutions must ask whether their mission still has a clear and compelling market.

2. Demographics, affordability, and competition are reshaping demand

Declining birth rates, regional population shifts, affordability pressure, and skepticism about value are changing the enrollment landscape for both independent schools and colleges. The 2030s are likely to bring fiercer competition as fewer students, tighter family budgets, and more educational alternatives reshape the market. Schools can no longer rely on tradition, prestige, or affection for the brand as proxies for current demand — families are asking clearer questions about value, outcomes, flexibility, and relevance.

3. AI is not an add-on — it is redefining education

AI removes the institution's historic monopoly on information. Students now have access to tools that can research, draft, synthesize, tutor, code, and design on demand. This shift makes content delivery less valuable and elevates the importance of judgment, wisdom, ethical reasoning, mentorship, and human formation. Institutions that treat AI as a policy issue or classroom tool will miss the larger point — it is forcing a rethink of what it means to be educated.

4. Secondary education may absorb some higher-ed functions

Independent schools have an opportunity to move beyond college preparation and become places where students begin earning specialized, real-world academic and professional capacity. Specialized tracks, experiential learning, internships, global projects, and portfolio-based credentials could make parts of the traditional freshman-year college experience feel less distinctive. As families question the ROI of higher education, independent schools can strengthen their value proposition by helping students build capability, maturity, and evidence of real-world readiness earlier.

5. The future advantage is clarity, not breadth

The most resilient schools will not try to be everything to everyone; they will define what they do uniquely well and why it matters. "Boutique" can remain a strength, but only if it means focus, distinctiveness, and excellence — not simply serving fewer people at a higher price. Future relevance will depend on moving from exclusivity to connection, from privilege to purpose, and from tradition to essential value.

6. Governance must rise to the moment

Boards need the right "hover height" — strategic enough to see the horizon, but close enough to understand market signals, enrollment realities, affordability, discounting, staffing, debt, facilities, and program economics. A board that only reviews budgets, dashboards, and operational updates is reacting, not governing. The better question is not "How did we do this year?" but "What are the next five years telling us?" Boards should distinguish between funding transformation and simply buying time.

7. The strategic question has changed

The central question is not "How do we avoid decline?" The better question — and the one every board should be sitting with this fall — is:

> **"What kind of institution does the future require us to become?"**

What High-Performing Institutions Have in Common

Once a board has metabolized the pressures facing the sector, the natural next question is: what does it actually look like to get this right? Across our work with schools globally, high performance shows up consistently at three levels — the institution, the leadership team, and the board itself.

High-Performing Schools

- Have a clear value proposition that families, students, faculty, alumni, and donors can understand and repeat.
- Know their core business and can clearly explain what they do best, for whom, and why it matters.
- Practice strategic enrollment management and marketing rather than relying on reputation, history, or hope.
- Maintain a distinctive identity with clear emotional and functional benefits for families.
- Pass the **"3D Test"** — Defendable, Distinctive, Desirable.
- Deliver an excellent product through strong academics, student experience, culture, outcomes, and family confidence.
- Leverage culture as a strategic asset rather than treating it as informal or accidental.
- Use connected information systems so decisions are based on evidence, not anecdotes.
- Stay externally focused on market trends, competitor schools, family expectations, demographic shifts, and industry change — while remaining internally responsive to their own community.
- Develop a deep leadership bench so institutional strength does not depend on one person.
- Connect vision, governance, and philanthropy so the school can fund and sustain its long-term future.

High-Performing Leadership Teams

- Balance the 80/20 rule — managing today's operations while spending meaningful time on future-facing, external, strategic work.
- Operate across all levels of work: generative thinking, strategic planning, tactical execution, and operational management.
- Remain nimble, agile, and collaborative, especially in a changing independent school market.

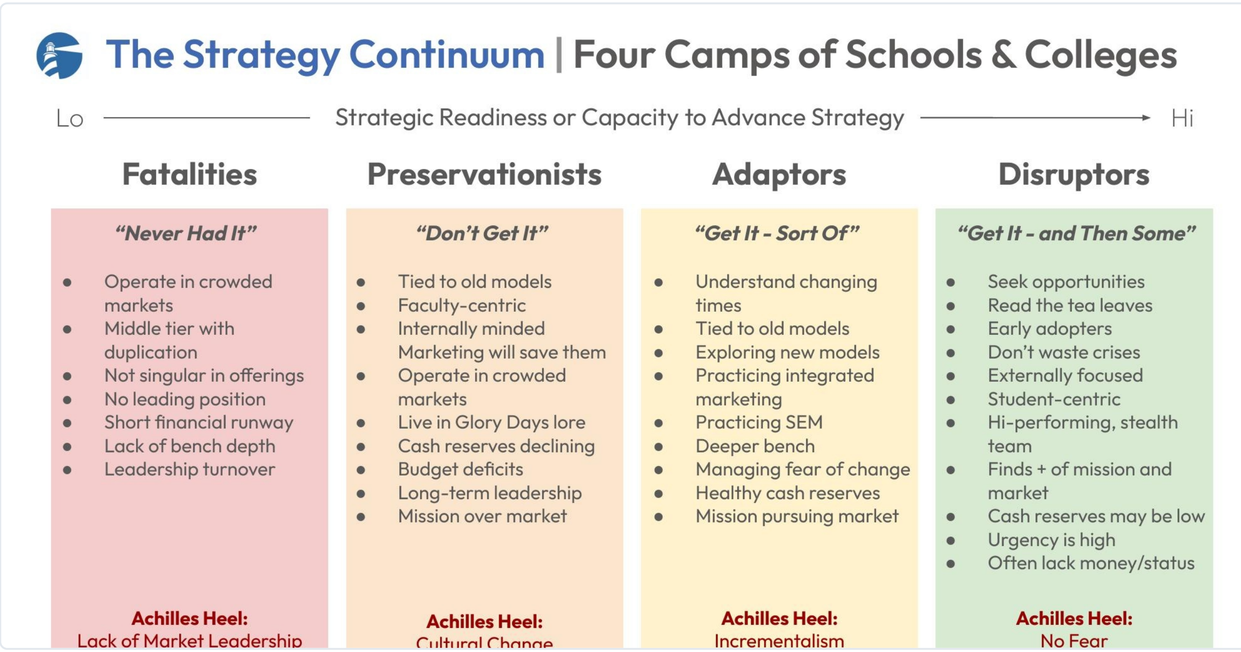
- Stay current with trends affecting enrollment, finance, staffing, student needs, technology, philanthropy, and parent expectations.
- Stay client-centered without becoming reactive to every individual concern.
- Watch for institutional blind spots and surface risks before they become crises.
- Provide the board with clear, accurate, and timely information so trustees can govern well.
- Serve as content experts across academics, finance, enrollment, advancement, student life, and operations.
- Remain strategically open-minded and willing to challenge legacy assumptions.
- Identify synergies across divisions so the school functions as one coordinated institution rather than separate silos.
- Translate vision into execution — turning strategic priorities into plans, metrics, ownership, and progress.

High-Performing Boards

- Understand the board's fiduciary responsibility to protect and advance the school's mission, assets, reputation, and future.
- Remember the **Three P's** — Policy, Practice, Plan.
- Focus on governance, not operations, staying out of school improvement and daily management.
- Work primarily at the strategic and generative levels rather than the tactical or operational levels.
- Make time for generative thinking about the school's future, identity, market position, risks, opportunities, and long-term sustainability.
- Eliminate personal bias and individual agendas, governing on behalf of the whole school.
- Stay current with industry trends so board decisions reflect today's realities.
- Align board structure with strategic priorities so committees and agendas support the plan.
- Meet less often, but more effectively — with stronger agendas, deeper preparation, and meaningful work between meetings.
- Inspire and activate philanthropy by modeling generosity and supporting advancement strategy.
- Ensure the future by focusing on sustainability, leadership continuity, financial strength, enrollment resilience, and mission relevance.
- Connect strategically with regional and industry leaders to expand the school's influence and visibility.

Navigating Change: The Strategy Continuum

If Section I describes the pressure and Section II describes the destination, this section is about the path. Most boards don't lack ambition — they lack a shared language for where their institution actually sits today, and what it will take to move. We think about institutional readiness along a continuum, from low strategic capacity to high.



The Strategy Continuum — Four Camps of Schools & Colleges. Ian Symmonds & Associates, Copyright 2026.

Fatalities operate in crowded markets, sit in an undifferentiated middle tier, and are running on a short financial runway with thin bench depth and frequent leadership turnover. Their Achilles heel is a lack of market leadership.

Preservationists are tied to old models, faculty-centric, and quietly convinced that marketing will save them — often under long-tenured leadership still prioritizing mission over market, while cash reserves decline. Their Achilles heel is cultural change.

Adaptors understand that times have changed and are actively exploring new models, practicing integrated marketing and strategic enrollment management, and building a deeper bench. Their Achilles heel is incrementalism — real progress, but rarely at the pace the environment now demands.

Disruptors/Innovators actively seek opportunities, read the tea leaves early, and don't waste a good crisis. They are externally focused and student-centric, often working with real urgency and limited resources. Their Achilles heel, notably, is no fear — boldness that can outrun institutional readiness if not paired with discipline.

> **What actually moves a school from left to right on this continuum is leadership** — specifically, stable, long-term institutional leadership. Every attribute in Section II requires time and continuity to build. Strategy is not a document; it is a capacity, and capacity compounds. A school with a strong plan and leadership turnover every three years keeps restarting from Preservationist. A school with steady, values-anchored leadership can compound its way from Adaptor toward Disruptor over time, because the trust, systems, and institutional memory needed to move fast without breaking things are allowed to actually accumulate.

This is the piece boards most often underweight. They focus on the plan, the campaign, the enrollment tactic of the moment — all necessary, none sufficient. The precondition underneath all of it is stable leadership with the runway to see a strategy through its uncomfortable middle years, where the old identity has been let go of but the new one hasn't fully arrived. That is where most institutions lose their nerve. It is also exactly where boards earn their keep — not by managing the school, but by protecting the conditions that let good leadership do its work over time.

The question in front of every board this fall isn't whether the sector is under pressure. It clearly is. The question is whether your institution has the self-awareness to know where it sits on the continuum, the courage to name what needs to change, and the patience to build the kind of stable leadership that can actually carry it there.

The journey matters. So does who's leading it, and for how long.

Ian Symmonds & Associates

Ian Symmonds & Associates partners with boards and leadership teams on the moments where the path forward isn't obvious — the same person, in the room, from the first conversation to the last. That steady, principal-led presence is how we help institutions align mission, market, money, governance, and human differentiation, and move deliberately, not accidentally, toward the future their communities deserve.

This briefing is offered each fall so boards and cabinets have a shared, current view of the sector before their planning conversations begin.

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